

BSBITU201

Produce simple word processed documents

Release 2

Learner guide

BSBITU201

Produce simple word processed documents

Release 2

Learner guide

Aspire Version 1.1

Copyright Warning

**This product is copyrighted to Aspire Training & Consulting
(ABN 51 054 306 428).**

Aspire Training & Consulting owns all copyright to its products. Except as permitted by the *Copyright Act 1968* (Cth) or unless you have obtained the specific written permission of Aspire Training & Consulting, you must not:

- reproduce or photocopy this product in whole or in part
- publish this product in whole or in part
- cause this product in whole or in part to be transmitted
- store this product in whole or in part in a retrieval system including a computer
- record this product in whole or in part either electronically or mechanically
- resell this product in whole or in part.

Aspire Training & Consulting:

- invests significant time and resources in creating its original products
- protects its copyright material
- will enforce its rights in copyright material
- reserves its legal rights to claim its loss and damage or an account of profits made resulting from infringements of its copyright.

Aspire is committed to developing quality resources that meet the needs of our customers. However, occasionally Aspire finds, or is notified of, errors. Please refer to our website at www.aspirelr.com.au to see if there are any updates that may be relevant to you.

Every effort has been made to ensure the information in this book is accurate; however, the author and publisher accept no responsibility for any loss, damage or injury arising from such information.

Except where an information source is acknowledged, the names and details of individuals and organisations used in examples are fictitious and have been devised for learning purposes only. Any similarity to actual people or organisations is unintentional.

All websites referred to in this unit were accessed and deemed appropriate at time of publication.

Aspire Training & Consulting apologises unreservedly for any copyright infringement that may have occurred and invites copyright owners to contact Aspire so any violation may be rectified.

BSBITU201 Produce simple word processed documents Release 2

© 2017 Aspire Training & Consulting
Level 1, 464 St Kilda Road
MELBOURNE VIC 3004 AUSTRALIA
Phone: (03) 9820 1300

First published April 2017

Cover design: Rewind Creative
Printer: Doculink Australia Pty Ltd, 1d/28 Rogers Street, Port Melbourne VIC 3207

e-ISBN 978-1-76059-429-9 (PDF version)
ISBN 978-1-76059-428-2

Contact details

Participant
Name:
Start date:
Phone number:
Email:
Work location
Name:
Address:
Postal address:
Workplace supervisor name:
Phone number:
Fax:
Email:
Registered Training Organisation (RTO)
Name:
Address:
Postal address (if different):
Phone number:
Fax:
RTO contact name:
Mobile:
Email:

Contents

Before you begin	vii
Topic 1: Prepare to produce documents	1
1A Use safe work practices	2
1B Identify the purpose, audience and presentation requirements for a document	19
1C Identify requirements for document layout and design	34
Summary	41
Learning checkpoint 1: Prepare to produce a document	42
Topic 2: Produce documents	47
2A Use appropriate software functions to format a document	48
2B Identify and manipulate screen display options and controls	60
2C Overcome problems with document presentation and production	65
Summary	68
Learning checkpoint 2: Produce documents	69
Topic 3: Finalise documents	73
3A Preview, check, adjust and print a final document	74
3B Prepare documents within time lines and requirements	80
3C Name and store documents, and exit the application safely	83
Summary	90
Learning checkpoint 3: Produce documents	91

Before you begin

This learner guide is based on the unit of competency *BSBITU201 Produce simple word processed documents*, Release 2. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Feature of the learner guide	How you can use each feature
Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples and case studies	Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks and learning checkpoints. Case studies highlight learning points and provide realistic examples of workplace situations.
Practice tasks	Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Video clips	Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: www.aspirelr.com.au/help
Summary	Key learning points are provided at the end of each topic.
Learning checkpoints	There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.



Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Reading	<ul style="list-style-type: none">Recognises textual information within organisational and task requirements to determine work requirements
Writing	<ul style="list-style-type: none">Records numerical and textual information in accordance with requirements of task
Oral communication	<ul style="list-style-type: none">Participates in a variety of spoken exchanges with relevant personnel in an effort to clarify document purpose, audience and presentation requirements
Navigate the world of work	<ul style="list-style-type: none">Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	<ul style="list-style-type: none">May seek guidance from more experienced work colleagues
Get the work done	<ul style="list-style-type: none">Understands functions and features of specific computer software and uses these to perform work tasks

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome	Rate your confidence in each section
Topic 1 Prepare to produce documents	1A Use safe work practices	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Identify the purpose, audience and presentation requirements for a document	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Identify requirements for document layout and design	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2 Produce documents	2A Use appropriate software functions to format a document	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Identify and manipulate screen display options and controls	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Overcome problems with document presentation and production	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 3 Finalise documents	3A Preview, check, adjust and print a final document	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Prepare documents within time lines and requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Name and store documents, and exit the application safely	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

Topic 1

Prepare to produce documents

Organisations require different types of word processed documents to carry out their operations. Before you can produce a word processed document, you need to find out why the document needs to be created. You have to clarify exactly what kind of information has to be in the document. You also need to find out who the intended audience is; for example, it may be for internal or external clients. Organisations use many types of documents, such as reports, letters, faxes and memos. Make sure you know your organisation's preferred presentation style. To create word processed documents, you may have to use templates that predefine your organisation's style. Or, you may have to design a template to the organisational specifications outlined by your manager. Whatever type of document you are producing, you need to confirm its requirements.

This unit is designed to give you an overview of how to operate Microsoft Word 2013, and uses the Windows operating system.

In this topic you will learn how to:

- 1A Use safe work practices
- 1B Identify the purpose, audience and presentation requirements for a document
- 1C Identify requirements for document layout and design

1A

Use safe work practices

Workplace safety is everyone's responsibility. Employers and employees must make an active contribution to ensuring their workplace is safe. Hazards need to be identified and risks assessed to reduce injury in the workplace. If you are working at a computer for an extended period each day, your workstation must be comfortable and designed for you to carry out your tasks efficiently. You will need to organise your work so that you are not doing a repetitive task for a long time. You should also take time to stand up and stretch.

Another consideration in the workplace is to use resource conservation techniques to prevent wastage. Most organisations require staff to follow resource-saving procedures such as turning off lights in unused rooms and recycling paper. You need to be aware of any conservation efforts made by your organisation.



Workplace safety legislative requirements

All work health and safety (WHS) legislation requires employers to provide a safe workplace and adequate training and supervision, while controlling workplace hazards and risks. You must work in line with legislative requirements, regulations, Australian and industry standards, and the relevant codes of practice.

WHS legislation describes the legal requirements for ensuring workplaces are safe and healthy, such as:

- managing risks to health and safety
- promoting and maintaining the health, safety and welfare of people at work
- protecting people at work from injury and illness, including psychological injury
- protecting the health and safety of the public in workplaces
- consulting workers and encouraging participation in maintaining WHS
- providing rehabilitation and maximum recovery for injured workers.

WHS policy

All workplaces in Australia are required to have a WHS policy that describes the organisation's responsibility for the health and safety of its employees. The policy should include the organisation's goals and objectives regarding WHS and a general set of guidelines related to health and safety in the workplace.

The WHS policy will help you fulfil your duty of care as a worker for the organisation.

WHS procedures

WHS procedures are instructions developed to ensure all employees work safely and effectively. In the context of working in an office and using a computer workstation, the following information should be contained in an organisation's WHS procedures.

Information contained in WHS procedures includes:

- workstation ergonomics
- standard safety precautions and housekeeping
- safe handling of hazardous substances (e.g. cleaning products)
- emergency and fire drills
- hazard identification and risk control
- manual handling
- emergency contact numbers, including local doctors and hospitals
- location of first-aid equipment and first-aid officers.

WHS regulations

The WHS legislation of each state or territory is supported by regulations and codes of practice. The WHS regulations support the legislation by outlining specific workplace health and safety requirements that must be addressed.

The Model WHS regulations, which provide a framework that most states and territories have adopted, have specific requirements for hazardous manual tasks that must be addressed. These requirements are summarised below.

Manage risk

A person conducting a business or undertaking must manage risks to health and safety relating to a musculoskeletal disorder associated with a hazardous manual task, in accordance with guidelines for managing risks to health and safety.

Control measures

In determining the control measures to implement, the person conducting the business or undertaking must have regard to all relevant matters that may contribute to a musculoskeletal disorder, including:

- postures, movements, forces and vibration relating to the hazardous manual task
- the duration and frequency of the hazardous manual task
- workplace environmental conditions that may affect the hazardous manual task or the worker performing it
- the design of the work area
- the layout of the workplace
- the systems of work used
- the nature, size, weight or number of persons, animals or things involved in carrying out the hazardous manual task.

Code of practice: hazardous manual tasks

The WHS regulations determine that it is a legal requirement for the person conducting a business or undertaking (PCBU) and workers to address hazardous manual tasks in the workplace. A PCBU has a broad definition that includes both employers and supervisors.

The code of practice for hazardous manual tasks was developed to provide guidance on how to manage risks associated with those manual tasks with the potential to cause musculoskeletal disorders (MSDs).

A PCBU must consult with workers, so far as it is reasonably practical, to develop their own set of procedures to manage the risk of MSDs.

The hazardous manual tasks code of practice helps PCBUs and workers to:

- identify hazardous manual tasks
- assess the risks
- control the risks
- review the control measures.

Musculoskeletal disorders

MSDs come about in two main ways:

- Gradual wear and tear to joints, ligaments, muscles and inter-vertebral discs through repeated or continuous use of the same body parts, including static body positions
- Sudden damage caused by strenuous activity or unexpected movements, such as when loads being handled move or change position suddenly

The repetitive movements and sustained body position associated with entering data into a computer is regarded as a hazardous manual task and puts the operator at risk of developing an MSD.

MSDs may include conditions such as:

- sprains and strains of muscles, ligaments and tendons
- back injuries, including damage to the muscles, tendons, ligaments, spinal discs, nerves, joints and bones
- joint and bone injuries or degeneration, including injuries to the shoulder, elbow, wrist, hip, knee, ankle, hands and feet
- nerve injuries or compression (e.g. carpal tunnel syndrome)
- muscular and vascular disorders as a result of hand-arm vibration
- soft tissue hernias
- chronic pain.

Standard precautions

Your workplace may need you to use standard precautions, particularly work practices related to the prevention of repetitive strain injuries (RSIs). These include ergonomic practices, workstation design, enforced breaks and exercise routines.

Workers in an office environment follow standard precautions when using a computer workstation. However, research on sitting has demonstrated that other precautions also need to be considered, such as the use of standing workstations, to ensure that injuries are prevented. It is important that you carefully follow any standard precautions that are prescribed for your workplace.



Equipment and systems safety checks

An important part of your daily work routine is to check the various systems and equipment you will use during the day to make sure they are in correct working order. Your workplace policies and procedures should include the steps to follow. You may need to perform this procedure at the start of your working day or at specified intervals during the day.

Workstation safety procedure/checklist:

- Seat is positioned in front of your computer and you can reach your keyboard comfortably.
- Computer monitor is positioned out of direct sunlight and at the correct height.

- Environment is dust-free as dust can affect the monitor or central processing unit of a computer.
- Cables are secured so no-one trips over them.
- Blinds and window coverings are used to reduce glare and heat at your workstation.
- Temperatures don't exceed 26°C and humidity is between 40 and 60 per cent.

Use ergonomic practices in the workplace

The aim of ergonomics is to reduce the risk of accidents, injury and ill health by applying safe work practices. Ergonomics is about creating comfortable working conditions by adapting workstations, tools and equipment to an individual worker's needs. It also improves performance and productivity in the workplace. Ergonomics covers all aspects of working, from physical stresses such as sitting at a workstation all day to environmental factors such as noise, air-conditioning and lighting.



Set up your workstation

A workstation includes a computer, screen, keyboard, mouse, desk and chair. How your workstation is designed can affect your health and wellbeing. Several physical problems can result from poor workstation design; for example, lower back strain may result from sitting in a chair that does not support your back. Below are some guidelines for setting up your workstation to be ergonomically efficient.

Chair

Adjust your chair height so that your feet are flat on the floor, your thighs are horizontal and your lower legs are vertical to the floor.

Adjust the backrest by raising it to the maximum height and then lower it until it fits the curve of your lower back. If this is not comfortable, lower it another couple of centimetres. Continue this until a comfortable position is found. The backrest should support your lower back.

The backrest may also be adjusted backwards and forwards. When seated in your usual working position, move the backrest until it exerts a gentle pressure on your lower back. Make sure there is at least two centimetres of space between the front of the seat and the back of your knees. Armrests should be positioned so that they do not interfere with carrying out your tasks.

Desk

When you sit at your desk, the surface should be just below your elbow height. If your desk is not height-adjustable, try to raise your chair so you are sitting at the correct height, and use a footrest to make up the difference. If your desk is too low, you may be able to extend the legs. You should have plenty of leg space underneath your desk. Don't clutter the space with bags and bins, as your legs may become cramped and your posture twisted. Position any equipment or materials you use so that you can reach them easily without twisting. For example, stationery items you frequently use should go in the top desk drawer, and your keyboard and screen should sit directly in front of you to avoid having to angle or twist your body.

Keyboard

The angle of your keyboard can be adjusted to suit your comfort level by moving the supports underneath it. Place the keyboard as close as possible to the front of your desk. Don't place documents between yourself and the keyboard, as stretching will eventually cause muscle strain in your arms, shoulders and neck. While typing it is best not to rest your wrists, as they should not be bent up, down, or to the side. The knuckle, wrist and top of the forearm should form a straight line. Wrist supports or rests give you a place to rest your hands only when pausing from typing, not while you are typing. Do not pound the keys; use a light touch. Leave enough room on your desk to put the keyboard out of the way when you are not using it.

Mouse

Place the mouse and mouse mat directly beside your keyboard on the side you prefer. If you use the mouse frequently, you could try to alternate sides. You will be surprised at how easy this becomes with practice. Your wrist should be straight, and the desk should support the weight of your wrist, not your arm. Try to keep your wrist flat and rest your fingers on the mouse between clicks. Hold the mouse lightly. Don't hold onto the mouse when you are not using it.

Screen

Once you have adjusted your chair and desk, you can position your screen. Adjust it so that the top of the screen is level with or slightly lower than your eyes. If you can't adjust the screen to the correct height, place the screen on a platform.

The screen should be at least 50 centimetres or an arm's length away from your seated position to minimise radiation exposure; however, you should always adjust the position of the screen to suit you. It is best to position the screen so that you can clearly read the text without leaning forward, twisting your neck, or looking too far upwards. Also take surrounding factors into consideration, such as reflection, glare and shadow, when positioning your screen.

Workstation features

The features of an ergonomic workstation are highlighted in the diagram below. Some features of the workstation may vary depending on the type of computer work being performed. Graphic work may require the use of a pen tool, and multiple monitors are commonly used for a variety of digital work.



Top of screen	The screen angle should be adjustable between 85 and 125 degrees to the horizontal.
Centre of screen	Minimise screen reflection and glare by using an anti-glare filter.
Bottom of screen	Place a document holder beneath or beside the screen at the same viewing distance as the screen.
Top line of sight	The viewing distance should be between 400 mm and 700 mm.
Bottom line of sight	A relaxed viewing angle is approximately 35 degrees.

continued ...

... continued

Head	Keep your head erect.
Shoulder	Have your upper arms hanging freely.
Elbow	Have your forearms approximately horizontal.
Above knee	Ensure there is clearance between the lower edge of the desk and your legs.
Below knee	Ensure there is clearance between the front edge of the seat and the lower leg.
Footrest	Use a footrest if needed.
Back of chair	The back support should be adjusted to support the small of your back.
Under chair	Adjust the seat height to suit your furniture and equipment.
Chair legs	Use a chair with a five castor base.

Desktop layout



Items on your desk, including equipment and resources, should be arranged within easy reach.

Your desk area can be divided into three zones:

- the optimum reach zone – the area closest to you, where your hands operate most of the time
- the maximum reach zone – further away, but still close enough to reach comfortably
- the outer reach zone – where you may have to bend forward or stand to reach items.

Make sure your desk is organised so that frequently used objects, such as your keyboard, are close to you. Intermittently used objects, such as your phone, should be out of the way but still within easy reach. Other resources used less frequently, such as in- and out-trays, should be in the outer reach zone.

Adjust your equipment and posture

When your posture is poor, you may suffer from aches and pains. Spending a long time in the same position can put stress on your body and this can be made worse if you are in an uncomfortable or poorly supported position. These symptoms may start out very slight, but if you continue to use poor posture they may get worse and become intolerable. They may result in cumulative stress given the constant stress on your muscles, nerves or tendons. When setting up your workstation, you need to make sure your posture will not cause you pain or discomfort. The equipment you use needs to be adjusted to suit your body shape and size, and the tasks you are doing.

You have already looked at adjusting your screen and chair. There are other office tools that can help your posture. These include the following items.

Document holders

Document holders are designed to hold papers and reference material in a convenient position for viewing. Place your document holder in the correct position. If it is below the screen or too far off to the side, each time your eyes look from one source to the other, your pupils have to adjust. Doing this for long periods of time can cause headaches and eyestrain. Place the document holder at a similar level, angle and distance as the screen to avoid having to shift eye focus.

Angle boards

Angle boards allow the user to maintain correct posture when reading, by reducing the angle between the work surface and the vertical posture. Adjustable to a suitable height and angle, these supports enable comfortable reading with the neck correctly positioned. Try to keep your neck as straight as possible when you are reading.

Footrests

A footrest may be necessary if you can't place your feet comfortably on the floor. Footrests allow your feet to rest at the correct height and on a tilting angle, which prevents strain on the lower back.

Headsets

If you use a telephone for long periods of time, it is a good idea to use a headset. A headset will keep your neck straight and your arms free. Headsets prevent you from bending your neck to support the telephone handpiece.

Home office

Communication technology and organisational policies to maintain a sustainable work-life balance are creating opportunities for more flexible working arrangements. This means that more employees are working from home offices or in other remote office locations. Many benefits can be derived from flexible working arrangement for employers and employees, but there is still a responsibility for all parties to make sure that home and remote offices use ergonomic practices and follow WHS requirements.

Hot desking

Hot desking is an office organisation system that is used in some workplaces where workstations are not assigned to an individual worker. Workstations may be used by multiple workers during different time periods or shifts.

The motivation behind hot desking is primarily the cost savings achieved by setting up fewer workstations in workplaces where not all the workers are in the office at the same time, or not in the office for long periods at a time.

Another common adaptation of hot desking is where work stations are assigned to individual workers, but need to be readily available for other workers to access based on daily work requirements, such as a group of people coming together to work on a specific project.

WHS and workplace culture considerations with hot desking

- It is common for workers to want their own space. Consequently, they may tend to choose one location and stick to it.
- It can take extra time each day to set up a work station for ergonomic and work efficiency.
- Personal hygiene needs to be maintained to prevent the spread of germs on keyboards and desk surfaces.
- Workstations need to be tidied appropriately in readiness for the next user. This can also involve some cleaning.

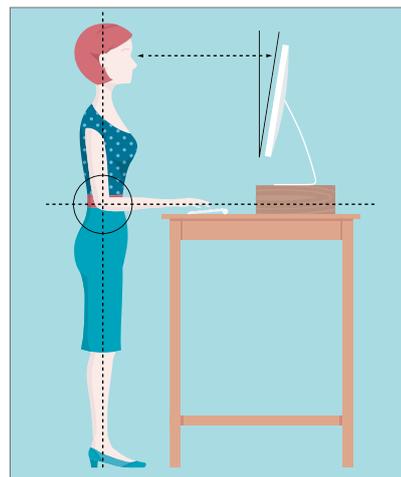
Standing desks

Sitting at a desk for long periods of time has many negative health impacts. It is claimed that the negative effects of prolonged sitting cannot be counteracted by regular exercise and that the only way to eliminate this problem is to avoid sitting as much as possible.

These negative health impacts can be overcome through the use of standing desks. Standing provides a greater opportunity for your body to move and adjust and involves more muscular activity than sitting.

Some of the health benefits from standing include:

- alleviating back pain and other repetitive stress injuries by greater use of core back muscles to support the upper body
- increasing focus, alertness and activity level by releasing restless energy
- reducing the risk of developing cardiovascular disease, diabetes and blood clots, which can be caused by prolonged sitting.



Standing desk ergonomics

Using a standing desk for hours on end requires you to adapt. It is recommended that you start using a standing desk gradually by alternating between sitting and standing. You may experience sore feet, tired legs and fatigue at first. Wear comfortable shoes and use an anti-fatigue floor mat.

An ergonomically designed standing work desk means you can maintain correct posture while working.

Position arms at 90 degrees when typing/standing.

Place the computer screen at eye-level and tilting it slightly upwards.

Place the computer monitor at least an arm's length away.

Avoid leaning over the desk; keep your body straight.

Monitor environmental factors

Environmental issues in the workplace include lighting, noise control and air quality. If the environment of your workplace is not monitored and controlled, you may suffer from headaches, fatigue, hearing loss or eyestrain.

Light

Good lighting is essential for a safe and hazard-free workplace. You need to see things clearly to work effectively. Simply shifting the screen slightly, adjusting blinds, altering the brightness settings on the screen and using desk lamps can avoid many light hazards. Try to use natural sunlight if the office layout can accommodate this. If not, keep bulbs and fixtures clean, focus light on your task and use fluorescent lights if possible.

Improper lighting can cause eyestrain and headaches.

Hazards associated with lighting include:

- glare – a computer screen positioned in front of a bright window can be difficult to see
- flickering lights – a fluorescent light may malfunction, causing annoyance, irritation and nausea
- inadequate or dim light – reading in dim light causes eyestrain
- reflections – sunlight reflecting on a screen can make it difficult to read
- shadows – shadows shifting across your work area can cause you to sit with bad posture in order to read your work.

Noise

Noise can include any annoying or disturbing sound. Excessive noise around heavy machinery or equipment can cause permanent hearing loss. Noise is a problem if it disturbs people, distracts them, interferes with communication, causes people stress or generally interferes with their work.

Many offices are open-plan in design, often with employees seated close to each other and divided by partitions at chest or head height. Think about noise levels when you set up your workstation. It should be possible for people in open-plan offices to have some privacy when they are on the telephone and carrying out their day-to-day activities.

Noise in the office can come from:

- machines (photocopiers, fax machines, printers)
- other equipment (telephones, paging systems, music)
- background noise (lifts, air-conditioning, traffic)
- people talking.

Noise management

Noise can also be a problem outside office environments, such as on factory floors, at construction sites or near airports. You may have to wear ear protection if you are required to work in excessively noisy areas.

There are many ways that problem noise can be controlled in the workplace. Noisy machines can be put in a separate room or area. Sound-absorbent materials such as carpet and partitions can be installed or arranged to deflect and absorb noise. The volume level on your telephone's speaker can be adjusted.



Remember that noise is only a hazard when it is stopping you from working productively, comfortably and safely. Many people prefer to work with low levels of noise rather than complete silence.

Air

Air-conditioned offices do not have fresh air from open windows. This can cause problems for some people.

Office workers frequently complain of being too hot or too cold. If a person's desk is near an air-conditioning outlet, the area around their desk can be much colder than elsewhere in the office. They can also suffer from dry and itchy eyes. Report such hazards to the relevant person. This situation can usually be corrected by adjusting air-conditioning flow.

Organise your work

Having a well-planned workstation and comfortable surroundings is pointless if you don't organise your work in a way that prevents discomfort or pain. Make sure you plan your daily tasks so that you aren't doing repetitive work for long periods of time. Make sure you take rest breaks and exercise regularly.

Positive work organisation includes:

- a mixture of repetitive and other activities
- rest periods
- exercise breaks.

Vary your activities

Your work role may involve several different tasks. Some tasks may be repetitive, such as typing up reports or entering data. If you are able to vary the tasks you carry out each day, this will help prevent repetitive actions that cause stress to your body. For example, if you have to enter a lot of data, break up the repetitive nature of the task by discussing a project with a fellow worker, collecting some research from the internet or doing another constructive workplace task you are responsible for. Workflow should be designed to reduce the repetitive tasks given to particular people.

Take rest periods

All employers need to provide rest periods for employees. Rest periods include tea breaks and lunch breaks. During the working day everyone needs to sit down, breathe easily, relax and take time to think about something other than work.

Have exercise breaks

When working with a computer, you should have short breaks at regular intervals to combat stress and prevent pain and discomfort. As discussed previously, using computers for too long without breaks has been associated with back and neck pain, headaches, migraines and eyestrain.

Try the following exercises several times a day, and encourage others around you to try them. Make sure you are relaxed and stretch gently, without overstretching. Stop if you feel any pain or discomfort, and remember to exercise both sides of your body. Most importantly, breathe deeply and evenly throughout the stretch.



Neck

Turn your head gently to look over your right shoulder. Hold for 10 seconds. Now roll your head forward to look over your left shoulder and hold for 10 seconds. Repeat several times.

Shoulders

Sitting with a straight back and neck, roll your shoulders forward, then back. Repeat several times.

Wrists, hands and arms

Interlacing fingers, turn palms upwards. Now lift arms over your head and stretch, leaning gently to the left and then to the right. Repeat movement several times.

Upper and lower back

In a standing position place hands in the small of the back. Gently arch back and hold for 10 seconds. Repeat when needed.

Shoulders and arms

Stretch your arms above your head, cradle your elbow with your hand and gently pull your elbow behind your head. Repeat on the other side, holding the stretch for 10 seconds.

Eyes

Every 20 minutes, look away from the screen. Focus on a distant object (more than three metres away).

Work without stress

Here are some tips for working without stress.

Tips to help minimise stress

- Adjust your chair and desk to suit your body.
- Position your screen to suit your posture.
- Adjust other equipment for safe and comfortable use.
- Reduce excess noise.
- Ensure you have adequate light.
- Arrange your desktop so you can access things easily.
- Take regular breaks from your work.
- Frequently rest your eyes.
- Do stretching exercises.
- Vary your tasks.

Practise conservation techniques

Conserving resources at work benefits not only the organisation by reducing costs, but also the planet by reducing greenhouse gases and the amount of waste sent to landfill. Most organisations have policies and procedures for conserving resources. You can find out what these are by reading your workplace manual or asking your manager or colleagues.



Ways to conserve resources at work include:

- minimising paper wastage
- reducing energy use.

Minimise paper wastage

Wasting paper costs organisations and the planet a great deal. Consequently, many organisations have developed policies for paper usage. These include:

- using both sides of the paper when photocopying
- recycling non-confidential waste paper in recycling bins
- storing email messages in an electronic folder instead of printing
- reducing the volume of printing where possible
- reusing paper by using blank sides for rough drafts and reusing folders and files
- using recycled paper or paper from plantation timber for printed documents
- using a recycling service to collect waste paper.

Example: office paper

Using the following statistics, consider how many trees are used for office paper.

How many trees are used to produce paper?

- One ton of uncoated virgin (non-recycled) printing and office paper uses 24 trees.
- One ton of 100 per cent virgin (non-recycled) newsprint uses 12 trees.
- One ream (500 sheets) of paper uses six per cent of a tree.
- One tree makes 16.67 reams of copy paper, or 8,335 sheets.
- One carton (10 reams) of 100 per cent virgin copier paper uses 60 per cent of a tree.
- One ton of coated, non-recycled higher-end magazine paper (used for high quality photographic magazines) uses more than 15 trees.
- One ton of coated, non-recycled lower-end magazine paper (used for news magazines and most catalogues) uses nearly eight trees.

The statistics in this example are based on US short tons (2,000 pounds), not metric tonnes.

Source: www.conservatree.com



Minimise energy use

Wasting energy also costs organisations and the planet a great deal. Many organisations have developed policies and procedures to save energy. These include:

- providing training programs on smart energy practices so that employees can practise energy efficiency
- turning off equipment when not in use
- using power-save functions for equipment
- refilling toner and ink cartridges from printers.

Resource conservation

Here are some tips for practising conservation.

Resource conservation tips

- Use the power-save function on printers when they are not in use.
- Print and copy on both sides of the page, where possible.
- Use recycled paper (paper used on one side) in the photocopier and printer for rough drafts.
- Use recycled paper for telephone messages.
- Place a recycling bin near the photocopier.

Practice task 1

Here is a checklist to follow when setting up your workstation. Go through the points that are relevant to you and make any necessary adjustments to your work or study space. You may need another person to help you and check your posture. If you are not able to tick some of the checkpoints, change your study space or discuss making alterations to your workstation with your manager.

Chair

- Is the seat height-adjustable?
- Is it high enough to allow you to sit comfortably over the keyboard?
- Is it stable?
- Does it swivel?
- Is the height of the backrest adjustable and does it tilt backwards and forwards?
- If it has arms, can you still get close enough to the desk and swivel the chair?
- Are your feet flat on the floor, or are you using a footrest?
- Are you sitting up straight with the backrest firm against your back?

Desk

- Is it large enough to allow the screen and keyboard to be correctly positioned?
- Is it low enough to allow you to keep your forearms horizontal or sloping downwards?
- Is it high enough to allow your thighs to fit underneath it?

Keyboard

- Can it be tilted to allow you to adjust it?
- Are the symbols on the keys clear and easy to see?
- Is there sufficient space in front of it to allow you to correctly position your arms?

Screen

- Does the screen have easily adjustable brightness and contrast controls?
- Is the image on the screen stable and flicker-free?
- Are there adjustment mechanisms to allow the screen to be tilted, swivelled or raised to avoid glare and reflections and help you keep a natural and relaxed posture?
- Are you sitting far away enough from it for comfort?

1B

Identify the purpose, audience and presentation requirements for a document

When you word process a document, you use a computer and software application to create a text-based document. For example, to word process a letter, you would type the text into Microsoft Word and format it as a letter. Before you can produce a word processed document, you need to find out its purpose. Who is it for? How should it be presented? The following information contains guidelines on what should be considered when determining a document's purpose, audience and presentation requirements.

Purpose

The purpose of a word processed document varies on a case-by-case basis. It may be an agenda for a meeting, or information for clients about organisational news or events. Sharing information is important in all organisations. Word processing is a common way to produce information for distribution.

If you are asked to produce a word processed document, the first thing you should clarify is the purpose of the document. Its purpose will determine the way it is planned and designed. For example, if the document's purpose is to provide detailed information about the progress of a project, you may need to collect information from colleagues before putting the document together.

Audience

You need to be aware of your document's audience. When you are producing a word processed document, keep in mind who it is intended for and decide how the information should be presented. For example, if you are developing a document for clients who are not familiar with its subject matter, you may need to avoid using jargon so they don't become confused. You have to consider the information needs of the audience and how detailed the information should be.

Presentation requirements

Most organisations have developed policies and procedures for how they would like word processed documents to be presented. How you present your document will enhance the audience's ability to understand it.

Organisational requirements for document type and style

Most organisations have requirements for the style in which documents should be presented.

You need to be familiar with the styles used by your organisation for each document type. Some organisations have developed templates to be used for word processing documents. A template is an established style and layout model for a document.

Word processed documents used by organisations can include:

- memos
- faxes
- agendas
- minutes
- reports
- briefing papers
- flyers
- letters
- standard form letters
- mail merge
- labels
- envelopes.

Document templates

Templates can be formatted to any style your organisation prefers. Templates ensure that particular kinds of word processed documents are always produced in the same style. If you have to create a template for your organisation, make sure you ask your manager for advice about organisational style requirements. If your organisation has existing templates, make sure you know where they are stored.



Memos

Look at the following example of a memo template. The template here can be used to quickly create a memo. A memo is a way to send information to people in an organisation.

Office Memo	
To:
cc:
From:
Date:
Subject:

Faxes

A fax is an electronically transmitted copy of a document. Sending a fax is a way to immediately send a hard-copy document from one location to another. A fax should have a cover sheet followed by the information the organisation wants to transmit. Your organisation may choose to design a fax template in a style that suits its requirements, or use one already available within its word processing software. Always file the faxes you send in case any issues arise regarding the contents.

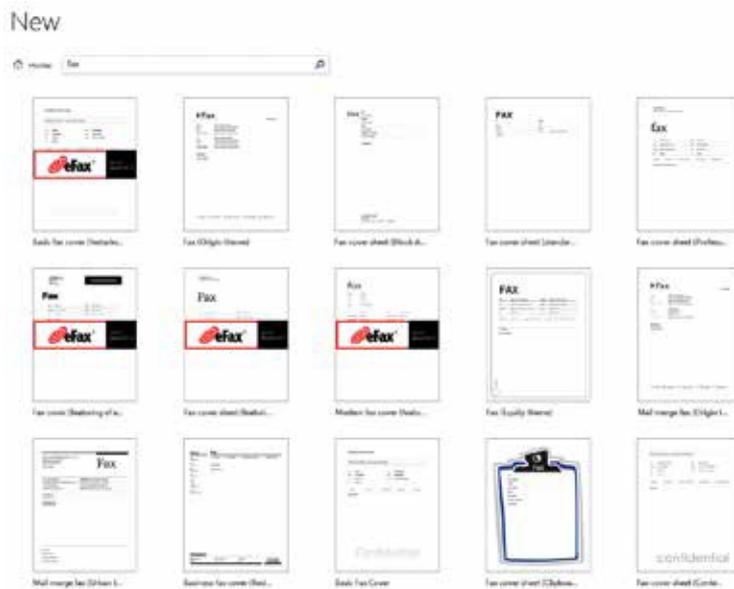


Create a fax

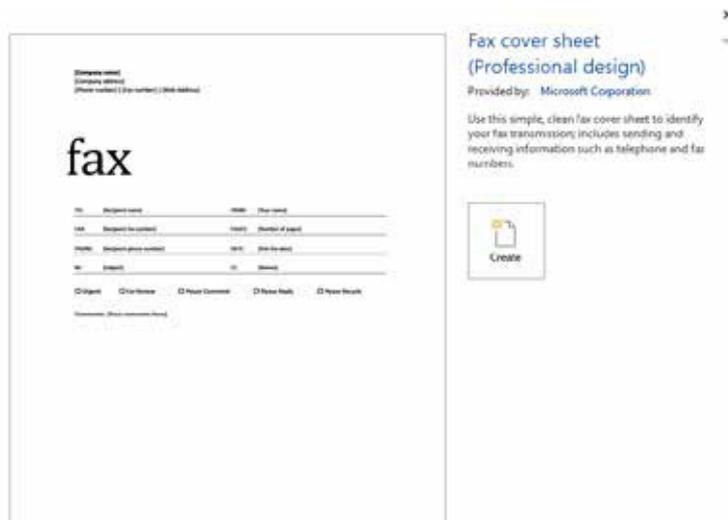
1. In the following exercise, you will create a fax using a Word fax template. Open Word.
2. In Search, type Fax and enter.



3. Select an appropriate fax template from the list (use either Installed Templates or Online Templates).



4. Select **Create**.



5. Spend 10 minutes entering information into the fax. The information can be anything relevant to an organisation, such as a list of staff addresses or a request for leave. Save your fax as MyFax.

Example: fax

The following example is a fax cover sheet designed by an organisation.

Western Importer	Paterson Road Melbourne 3004 Phone (03) 9620 1305 Fax: (03) 9621 4642 national@wimp.com.au
Facsimile	
To:	Gumboots Galore
Attention:	Gavin Jones
Fax number:	(03) 9873 2469
From:	Cheryl Johnston
Date:	4 February 2016
Re:	Monthly order
No. of pages:	3 (including this one)
<p>Please find attached our order for March. I will phone today to clarify delivery instructions. Thanks Cheryl Please telephone the above number if any pages are missing.</p>	

Agendas

An agenda is a list of items to be covered at a meeting. It helps participants follow the proceedings. Agendas are also used to specify the events for many other sorts of business activities, such as talks at a conference.

Word has Agenda templates that you can use to create an agenda. By selecting the **File** tab, choosing **New**, and **Agendas**, you can access the online agenda templates.



Minutes

Minutes are a written record of what occurred in a meeting. A list of participants is recorded as well as the details of all issues discussed. Minutes are written at the time of the meeting and are often placed on a server (a computer network) where all employees can access them. It may be your responsibility to write meeting minutes, so make sure you know where to find previous minutes. By looking at previous minutes, you will find out how your organisation prefers to have them presented. Look at the following example of meeting minutes.

Example: minutes

Minutes of the monthly meeting of the Equipment Committee of Engineering Forces on Wednesday 20 April at 2.00 pm at 237 Fraser Street, Belton

Present

G. Jones (Chair), L. Meadows, D. Juntovski, J. Crance, A. Andrews, S. Tran, H. Roberts

Apologies

J. Rostova

Minutes of the previous meeting

The minutes of the previous meeting were confirmed and adopted as an accurate record.

Correspondence

A letter was received from Century Computers ordering two computers and a modem.

A letter was sent to the Royale Receptions Centre requesting information on facilities.

Reports

G. Jones reported that the consultant from Eagle Consultancy had completed a report on the computer needs of the company. The findings will be summarised and distributed to all staff members.

Action: H. Roberts to prepare a summary and distribute to staff within a week.

J. Crance presented the financial report on spending for March. Major items were the coffee maker and filing cabinet. The report was accepted.

A report from the Occupational Health and Safety Officer was tabled and discussion deferred to the next meeting.

Other business

D. Juntovski reported that the printer had consistently broken down during the previous three weeks and requested that the cost of getting a new printer be investigated. The meeting discussed the possibility of obtaining a second-hand printer.

Action: A. Andrews will obtain costs for a new printer and a second-hand printer from a range of suppliers and report at the next meeting.

Next meeting

The next meeting was set for Friday 29 April at 2.00 pm.

Reports

A report is a document that outlines information about an activity in an organisation. A report may be written about the progress of an existing project, to detail the feasibility of a future project or to summarise the findings of research that has been undertaken. Writing a report is a way of communicating organisational information to a wide audience.



Reports often include many details that need to be collected from multiple people within an organisation. For example, multiple teams may be working on one project and their progress needs to be recorded in one report. To access a variety of report templates, open Word, select **New**, and select **Installed Templates**.

Example: report

Look at the following example of a report outline. Because reports are generally quite long and detailed, the report example is only an outline.

Wilson & Sons Pty Ltd

Report of Phase 1 of the Edition 5 Project

The Edition 5 Project is developing a new product to be ready for client sales in the following year.

The following Phase 1 milestones of the Edition 5 Project have been successfully reached:

- Evaluation of clients' needs has taken place.
- Collation and analysis of the results has been completed.
- A report into the evaluation findings has been released.

Phase 1 actions that need to take place include:

- development of plans for using the evaluation findings in the Edition 5 Project
- the assembly of a development team and the release of its plans in two weeks.

Briefing papers

A briefing paper provides an outline or summary of key points and information. Briefing papers are often used for reporting an outline of relevant issues to management or to colleagues at meetings. The point of a briefing paper is to enable readers to quickly scan the information so they can understand the important issues.

Flyers

A flyer is a piece of paper that is distributed to a wide audience to advertise an event, product or service. An organisation may produce a flyer to post to clients to inform them of a special offer, or to let staff know about an upcoming event. The point of a flyer is to attract people's attention and interest them in the flyer's subject. Look at the following flyer.



Letters

Organisations commonly use business letters to send information to internal and external clients. Many organisations have printed letterhead paper, and the information is word processed before being printed on the paper. An organisation may choose to design a letter template that suits its organisational style requirements or use one available from word processing software.



Example: letter

What sort of things may be style requirements in the following example of a letter?

Near East Trading Co

131 Victory Road

Kensington TAS 7725

Telephone: (03) 3275 9123; Fax: (03) 2175 9124

19 February 2016

Ms Peta Jones

Manager

Expo Furniture

28 Hopper Street

Cairns QLD 4870

Dear Peta,

Order Number 21560

I wish to apologise for the delivery of the damaged dining table. A credit note to the value of \$400 is enclosed.

We are pleased to announce that our 'Summer Selection' is currently being finalised. A catalogue is in production and should be available in about two weeks. A copy of the catalogue will be forwarded to you as soon as it is available.

At the beginning of March our sales representative will start showing the range to all our clients. You will be contacted personally to arrange an appointment to view the 'Summer Selection'.

We hope you will be as impressed as we are with the new range. Please contact us if you require any further information.

Regards,

Sophie Wilson

Brand Manager

Enc. 'Summer Selection' catalogue

ef25/sw/xx

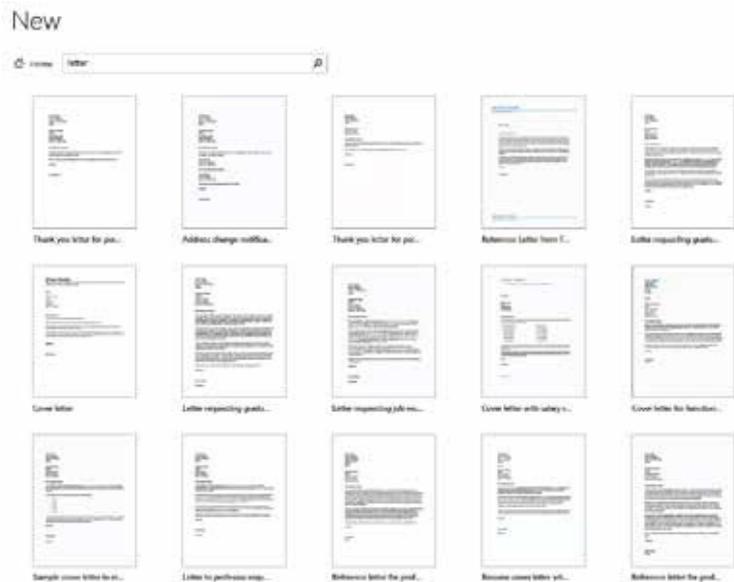
Create a letter

In the following exercise, you are required to create a letter using a Word Letter template.

1. Open Word.
2. In **Search**, type 'Letter' and press enter.



3. Choose an appropriate **Letter template** from the online template list.



4. Select **Create**.



5. Spend 30 minutes composing a letter on a subject of your choice. Save your letter as MyLetter.

Standard form letters

Many organisations have standard letters for different types of communication, including letters that are sent out regularly. Examples of standard form letters include acknowledgement letters, overdue payment letters and customer reward letters. Standard letters can be stored as a template on the computer system and accessed by selecting the **File** tab, **New**, and **My templates**.

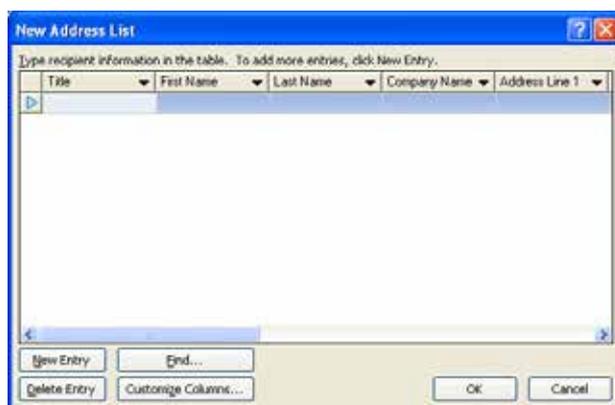
Mail merge

The mail merge facility in Word can be used to send the same information to a number of people. Mail merge is used for sales and marketing letters, evaluation-of-service letters and newsletter distribution. It can be used for letters, envelopes and labels. Any information can be used as a merge, including name, address, postcode, customer number, amount owing and customer preference. Data used in the merge can be already stored via spreadsheet or database programs, or as a table in Word. It is possible to use either existing data or a list of data created as part of the mail merge process. The list of data that is created can be used again if further mail merge documents are required.

Create a mail merge letter

In the following exercise, you are required to perform a letter mail merge and create a data source for the merge.

1. Open the letter you created in the previous exercise and delete the details of the recipient. The letter will be used as a proforma for the merged letter that you are about to create.
2. Select the **Mailings** tab.
3. Select **Start Mail Merge** button and choose **Letters**. (It is possible to choose other options such as labels and envelopes.)
4. Click on **Select Recipients** button.
5. Select **Type New List**. (If there is already an existing database of contact details to be used access by selecting **Use Existing List** – select the appropriate file. Next step is 8.)



6. Record required details (**Title, First Name, Last Name**, etc.).
7. If additional fields are required, such as **Postcode**, you can rename a column, select **Customize Columns**, select the field you want to rename and click **Rename...** . If entries are not required, select **Delete**. When you have the desired fields, click **OK**.
8. Details to be recorded in the Address List are as follows:

Title	Mr	Ms	Ms
First Name	John	Janelle	Ha
Last Name	Smith	Groves	Duong
Company Name	Green Thumbs	Livestock Inc.	ARV Financial
Address Line 1	12 Smith St	12 Dorset St	31 Gloster Rd
Suburb	Melbourne	Sydney	Sydney
State	VIC	NSW	NSW
Postcode	3000	2000	2000

9. Click **OK**. Save the database of the list of names as MyList.
10. To add all the fields required for addressing the letter, place the cursor where you want to insert the address block. From the **Mailings** tab, click the **Address Block** button. Specify the address block elements and click **OK**. Remove the existing address fields you are replacing.
11. To insert a single required field (for example, a greeting line), use the **Insert Merge Field** button.
12. Choose **Preview results** to check the layout and presentation.
13. If you are happy with the letters, from the **Home** tab, select **File** and **Print**.
14. To edit each letter individually, from the **Mailings** tab select **Finish & Merge**, then **Edit Individual Documents**. The letters will open in a new document for you to edit individually.
15. Close the letters to return to the master letter documents.
16. If you are satisfied with the master document, from the **Mailings** tab select the **Finish & Merge** button. Select **File and Print documents**.
17. Go to the **Home** tab, select **Save As** and save the master letter as MyMerge.

Mail merging suggestions

Here are some tips on mail merging.

Break details into small parts

A common error that people make when inputting the address is to record all details under address line 1. Mail merge works with fields, which means that all details need to be broken up into smaller parts to enable you to manipulate the information as you see fit.

Be aware of how data will appear

Be aware that how you insert the merge fields is how the data will appear, so if spaces or line breaks are required you will need to manually insert these into the document.

Printing merged document

When undertaking a merge document in the workplace, there may be numerous letters consisting of the same information, addressed to different people. In most cases, a merge document will be sent to print with only the merged document outline, with the associated database being stored in the computer system.

Labels and envelopes

All organisations need to have a system for entering addresses for correspondence to clients or suppliers. An organisation may choose to enter addresses directly onto envelopes or to print out strips of labels that stick onto the envelopes.

You can use word processing software to create labels and to print addresses onto envelopes. If you are responsible for large mailouts in an organisation, this software function can save you a lot of time.

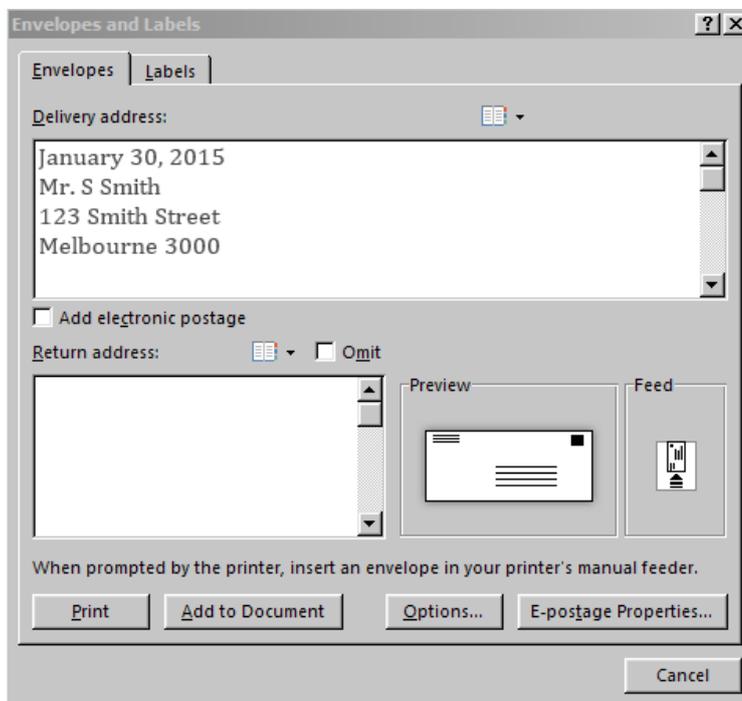


Word process an address on an envelope

In the following exercise, you will word process an address for an envelope.

To add an address to an envelope, you are required to use an existing letter.

1. Open your MyLetter document.
2. From the **Mailings** tab, it is possible to choose either the **Envelopes** or **Labels** button. For this activity, select **Envelopes**. The recipient's address that you typed into your letter should appear in the **Delivery address** box. Look at the following example of the dialogue box to help you.

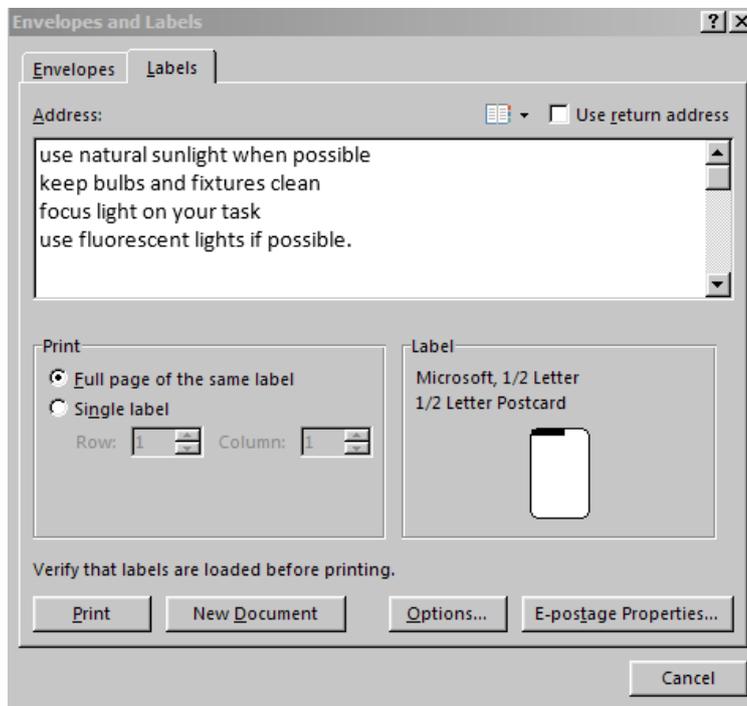


3. Under **Return address**, enter a return address (your organisation or home).
4. If you want to change the size of the envelope, click **Options**. Click **Envelope Options** and enter the correct envelope size. Click **OK**.
5. To print your envelope, place an envelope in the printer and click **Print**. Make sure the envelope is inserted the right way. Close your MyLetter document.

Create a label

In the following exercise, you are required to create an address for a mailing label.

1. Create a new, blank Word document.
2. From the **Mailings** tab, select the **Labels** button.



3. Under **Address**, enter an address for your label. You can print a full page or a single label. For this exercise, select **Single label**.
4. To select a specific label size, click **Options**. Many labels have a special size code that Word recognises. Check the labels you are using and make sure the code is in the label options. Select the appropriate label size and click **OK**.
5. To print your label, place a label sheet in the printer and click **Print**. Make sure the sheet is inserted the right way. You don't need to save your label.

Practice task 2

Create a database address list and mail merge document to merge the information to mailing labels.

- Label details: Avery A4/A5, C2160. (If you are in a workplace, locate the reference details of the mailing labels that are used from the available list.)
- Insert the address block and select the **Update labels** button from the **Mailings** tab. This will input all of the contact details in your merged document.
- Select the **Preview results** button from the **Mailings** tab. Review and proofread the information.
- Save the document as MyLabels.

1C

Identify requirements for document layout and design

Most organisations require employees to adhere to specific layouts and designs when creating documents. This may include using standard templates or using corporate letterhead for certain types of documents.

Consistent document layout and design helps to identify an organisation and demonstrates its professionalism and culture to those who are to receive the communication. It is therefore important that care is taken in design and layout, and that it adheres to the corporate image of the organisation that it represents.

Document layout and design may relate to such things as:

- margin width
- font and size
- spacing of text and paragraphs
- alignment of text
- use of header/footer
- document reference details
- signature blocks and document sign-off
- use of logos and motto.

Corporate colour scheme

Some organisations stipulate strict adherence to particular colour schemes in the production of documents. This may relate to the actual production of the word processed document and the type of font and colours used, as well as the colour and type of paper used for certain correspondence. For example, some organisations use coloured paper with corporate letterhead for the first page of outgoing correspondence and plain paper for supplementary pages.

Alternatively, some organisations have their own colour scheme and logos as a template on the system – if so, you will need to ensure you send the document to print to the colour printer as opposed to a black and white printer. Where possible, verify colour scheme requirements with your supervisor or colleagues. The use of a colour scheme helps to promote the corporate image of the organisation, and the scheme is usually similar colouring to that of the corporate logo.

Corporate logo

Many organisations have guidelines for the use of corporate logos. This may relate to logo size, colour and use. Particularly in larger organisations, it may be necessary to obtain permission for use of the logo. This is because a logo is part of an organisation's branding. Therefore, the organisation needs to give approval for the logo's use to ensure its brand is used appropriately and any use adheres to the relevant guidelines. Examples of when this could be necessary include invitation letters, sales campaigns and presentation material.



For simple documents that are being produced, it is normally a matter of using existing templates and/or letterhead for outgoing correspondence. Therefore use of the logo has already been pre-approved. Discuss the use of the logo with supervisors and colleagues, and refer to policy manuals if possible.

Consistent corporate image

Adhering to strict corporate image guidelines when producing documents is very important in some organisations. How colours and the logo are used, and the layout and design of a document all reflect an organisation's image and how it is viewed within the marketplace. Many organisations spend money on creating a brand or image that is designed to send a subconscious message of what it is they are trying to achieve.

The use of a consistent corporate image reflects what the organisation considers important. Some organisations believe the use of colours can engender certain feelings or emotions; for example, blue is said to be a more 'trusting' colour. Organisations that aim to be seen as professional service providers may use a more traditional approach to the layout and design of documents. Organisations that want their image to reflect a more modern approach may have their letterhead with the logo and corporate details on the side of the document as opposed to the top. Fonts may be chosen to reflect a modern or conservative image.

House styles

Many organisations have style guides for producing documents. Style guides include rules for the type of font or layout of documents. Examples include:

- Arial 12 pt for the body text of a standard letter
- the left margin at 4 cm
- the number of lines between text in the document (for example, the space from the letterhead, the number of lines from the address line to the greeting)
- file reference details at the top of the document in italics
- the number of lines for the signature block.

In many cases, if a standard template is used, predefined styles will automatically appear in the document. Alternatively, an organisation may prefer to apply Word styles to documents. Clarify use of house styles for your organisation with your supervisor and colleagues.



Content restrictions

Some information that you have access to in an organisation is not for the public domain; for instance, information on profit expectations, customer contact details or specific customer buying habits. It is essential that you adhere to restrictions on the type of content that can be used within documents that you produce, and that sensitive material is not included. The production of documents needs to be tailored to the intended audience, using language and terms that they understand. The use of jargon and confusing abbreviations should be avoided.

Copyright

Organisations frequently refer to copyright and use disclaimers in documents they produce. An organisation may follow a particular practice when using copyrighted material. For instance, if it is quoting from another source in the document, it may reference the text by author and page (for example, Smith, p. 9), and then provide a more detailed reference as a footnote (for example, Smith, P 2007, *The art of referencing*, The Book Press, Crows Nest, NSW.).

To insert a footnote, select the References tab, select the **Cross-reference** button, select **Footnote**, and enter the details. You will notice that the text now has a number at the end of it, which refers to the footnote. This can be used to take you to the reference details.

Disclaimers are commonly used for outgoing correspondence such as emails, faxes and newsletters. Disclaimers generally state that the information is for the intended recipient only, or it may refer to the information being correct at the time of printing. However, further expert advice may be required before disclaimers are applied to a document.

Headers and footers

Headers and footers are used to record common information about a document. A header is found at the top of the document above the top margin; a footer is found at the bottom of the document below the bottom margin. In some cases, templates may include a header that contains the organisation's letterhead with a logo and contact details.



You may be required to insert a header or footer that contains more information, including the organisation's name, time, date, document title and file name. Most of this information is available as predefined buttons or fields; alternatively you may need to type in the information required. Most organisations have specific guidelines to follow for what is to be contained in the header/footer. Apart from letterhead, in many cases the information in the header/footer is of a smaller size to the body text, and may have a different font applied. The information that appears in headers and footers is repeated throughout a document, or within sections of a document.

Create a header

In the following exercise, you will create a header.

1. Open your MyLetter document.
2. Select the **Insert** tab.
3. Select the **Header** button.
4. Select the style of header from the listing or select **Edit Header** to insert your own style of header.
5. You will notice that the screen options have changed to the **Design** tab. From here you can either type in the header required, or select the appropriate buttons to insert predefined fields into your document (for example, filename and date). Common buttons to use include **Page Number**, **Date & Time**, or **Quick Parts**. Type in your name and the date.
6. Once you have inserted the required header, double-click back into the main document.
7. Save and close MyLetter.

It is also possible to access the header/footer by double-clicking within the margin.

Templates

Templates provide a quick and easy way to access documents that have a standard layout and styles. Examples include memos, letterheads, faxes, standard customer letters and standard staff letters. Templates used by organisations can be created in-house or obtained online. There is a wide range of templates available for word processing of documents, such as agendas, letters, memos, invoices and invitations. In Microsoft Word 2013, the templates are available online, which means you need to be connected to the internet to be able to use them. Alternatively, you can access common templates via Installed Templates.

Using template designs can be useful if you are not sure how to set up particular documents, or if you want to alter the layout of existing documents. In most organisations, templates are used for standard letters and documents. These are stored in either Sample Templates or My Templates.

Creating a fax template

In the following exercise, you will create a fax using an existing template.

1. In Word, select the **File** tab and select **New**.

New

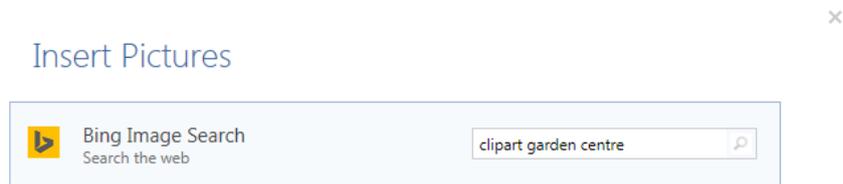


2. Search for **Equity Fax** and select the **Fax cover sheet (Equity theme)**.



3. Select **Create**. The screen will now display a blank fax proforma that you can manipulate. Add clipart to the fax to represent a corporate logo by going to the **Insert** tab and choosing **Online Pictures**.

4. In the **Bing Image Search**, type Clipart and the type of picture you're looking for. For example, Clipart Garden Centre. Select an image and click **Insert** and resize the image as appropriate. *Note: search results are images licensed under Creative Commons. Please review the specific licence for any image you want to use to ensure you can comply with it.*



5. Insert a disclaimer stating that the fax is for the intended recipient only. (If your workplace has a specific disclaimer, insert it here.)
6. Save the document as a template called CompanyFax. The document will not automatically be saved as a template. Select **Word template** from the **Save as type** drop-down menu.
7. Create a footer that provides details of the file reference. To use the template, open Word and select **Custom**. Select **Custom Office Templates**, then the template you saved. This will provide you with a blank proforma of the document, which you can use and save as appropriate.

Practice task 3

Read the case study, then complete the questions that follow.

Case study

Isabella completed her studies in human resource management and gained a position as a human resources officer with a large multinational company. After working in the position for approximately six months, Isabella had impressed her supervisor and manager with her dedication and enthusiasm. As a reward, they asked her to manage a project of creating a new induction resource pack for new managers at the organisation.

In her project brief, she was asked to include information on the role of human resources and the importance of line managers interacting with human resources for advice and guidance on workplace issues. At first Isabella wasn't sure how to tackle this assignment; however, she investigated trade journals and various textbooks, along with the HR policy manual. Isabella located three relevant trade journal articles and some information on decision-making models from textbooks, which she believed would complement the information she had sourced from the HR policy manual. Isabella set about word processing the articles and models to make them look more appealing.

Once complete, she signed off each document with 'by Isabella Gonivici'. Isabella did not reference the articles or textbooks and did not state who had researched the models. In a brainwave, Isabella decided to send regular customers details of new managers' after hours home phone numbers just in case they couldn't reach them during the day. She thought this would complement the organisation's policy of total customer service. Isabella was pleased with her work and was looking forward to the accolades that would follow from her supervisor and manager.

1. Were there any possible copyright infringements in Isabella's completion of the task?

2. Were there any content restriction issues?

3. What should Isabella have done differently?

Summary

1. Safe work practices – ergonomics, work organisation, and energy and resource conservation – enhance working conditions and help to improve the overall effectiveness and efficiency of the office.
2. Understanding the purpose of a word processed document leads to strong and effective communication.
3. The audience for a word processed document is the people who will eventually read it.
4. A word processed document needs to be presented in a way that meets organisational and task requirements.
5. Types of word processed documents used by organisations include memos, faxes, agendas, minutes, reports, briefing papers, flyers, letters, standard form letters, mail merges, labels and envelopes.
6. Organisations may use a template, which is a layout model for a document. They may have designed the template themselves or they may use one that is included in their word processing software.

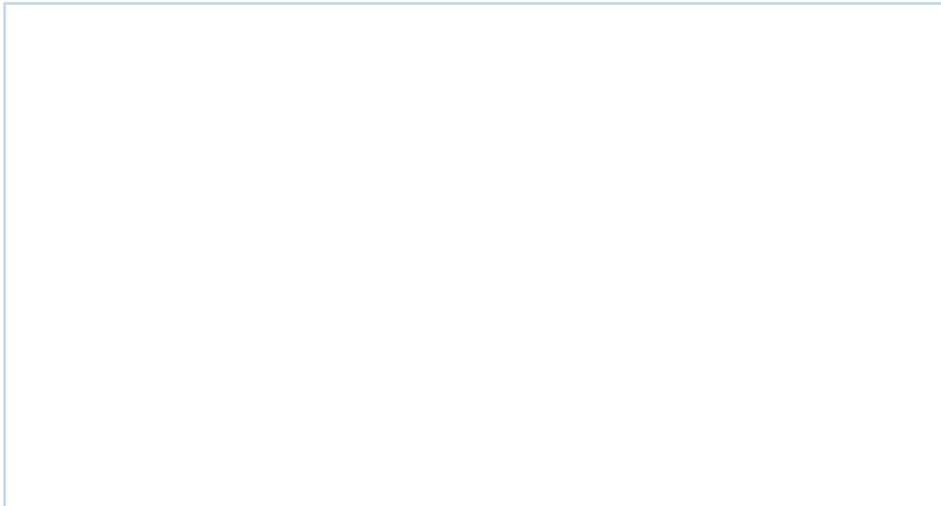
Learning checkpoint 1

Prepare to produce a document

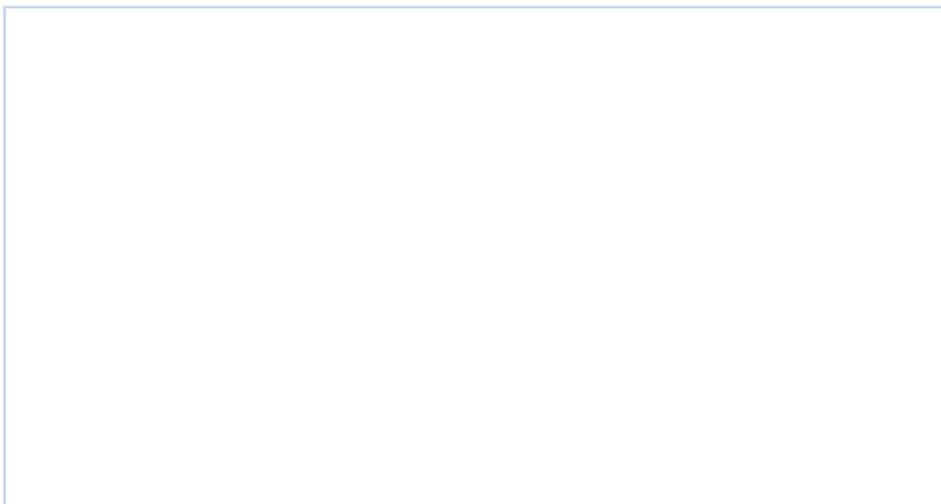
This learning checkpoint allows you to review your skills and knowledge in preparing to produce documents.

Part A

1. Create a template. You can follow the requirements of your organisation, or an organisation you are familiar with. The template should be consistent with the organisation's style and layout requirements.
2. Explain how you used safe work practices, including ergonomics, work organisation and the conservation of paper, when creating the document.



3. Explain the purpose, intended audience and presentation requirements of the document template you have produced.



Part B

Read the case study, then answer the questions that follow.

Case study

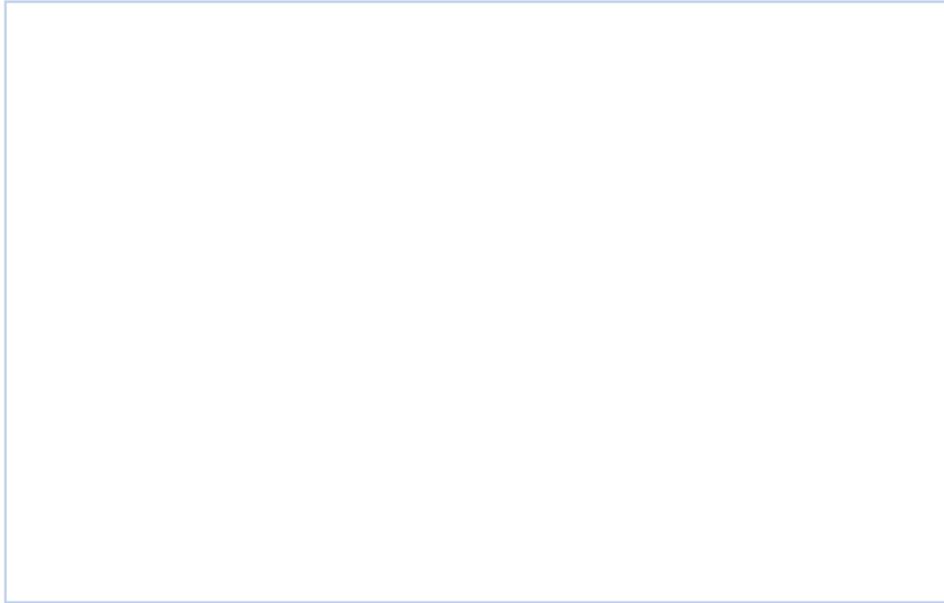
Angela works as an administrative assistant in a large organisation. One of her duties is to word process documents for internal and external circulation. One day her manager gives her the outline of a report that is needed for a board of directors' meeting the following week.

Angela first clarifies with her manager why the document needs to be created, the level of detail required by the board of directors and the presentation requirements for the document. Angela also enquires about the report's security and discovers that the document will contain confidential material and should be protected at all times.

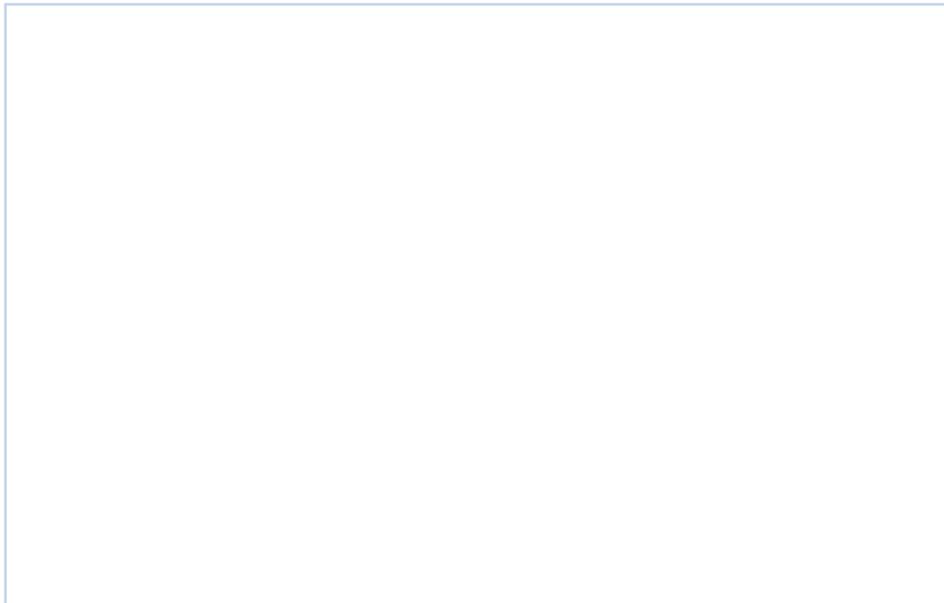
1. Angela clarified four issues before word processing the report. Describe these four issues.

2. Explain why it is important to understand the purpose, audience and presentation requirements of a document before producing a word processed document.

3. Describe what things Angela would need to consider when preparing the design and layout of the document.



4. Describe what Angela should do to ensure she is working safely when producing the document.



Part C

Write a plan for the production of a document. You can use your own workplace or an organisation you are familiar with. You don't have to produce the document; just plan for its production.

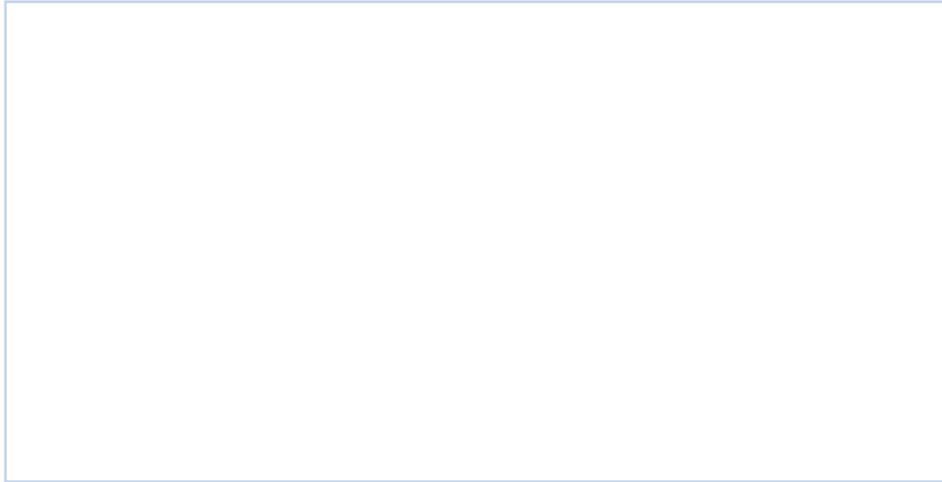
1. Describe why this document is required by the organisation. For example, it might be a report about a project, a letter or a fax that needs to be sent to a client.

2. Explain who the intended audience for the document is.

3. Describe the presentation style required for the document.

4. Explain how the presentation style chosen will enhance the audience's ability to read and understand the document.

5. Describe what you will do to ensure you are practising workplace safety when producing the document.



Topic 2

Produce documents

When producing a word processed document, you should use software functions and formatting options to ensure the document has a consistent design and layout. You need to check and amend documents in accordance with organisational and task requirements. Developing skills in proofreading and editing will help you produce documents that are free from errors.

Being able to use the screen display options and controls of the software program can assist in the production of documents. Screen display options and controls provide you with further ability to check and proof the document before you print. They also allow you to manipulate the on-screen production of the document, as well as make choices about the overall appearance of the document layout.

Before printing documents, you need to preview and adjust them in order to produce hard-copy documents that suit organisational requirements. Manuals, training booklets and help desks can be used to help solve problems that arise when producing word processed documents.

In this topic you will learn how to:

- 2A Use appropriate software functions to format a document
- 2B Identify and manipulate screen display options and controls
- 2C Overcome problems with document presentation and production

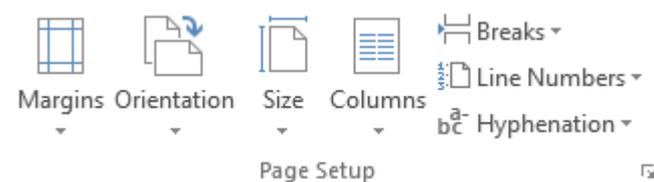
2A

Use appropriate software functions to format a document

Word processing functions are used so that documents have a consistent design and layout. Common word processing functions include formatting paragraphs, inserting page numbers, adjusting spacing, inserting headers and footers, and checking spelling and grammar.

When you open a new Word document, it will have a number of default settings such as font type and size, paragraph indentation and spacing. You need to be able to alter these settings to produce documents that suit your organisation's style requirements.

Page Setup



The **Page Layout** function allows you to choose options to change the overall appearance of a document. The options you can choose include the paper size, the document margins, the vertical alignment of text on the page and the orientation of the document. As part of the **Page Layout** tab, there are various **Page Setup** tool buttons that enable quick and easy access to the options required to make alterations. You can use the **Page Setup** function to alter the entire document or just part of it.

Here are some tips for changing the page setup of your document:

- To modify the page setup of an entire document, place the pointer anywhere within the document.
- To modify a portion of a document, select the text you want to change by highlighting it.

Once you have decided which parts of the document you want to alter, select the appropriate **Page Setup** tool buttons, from the **Page Layout** tab.

Set margins

1. Open your MyLetter document.
2. Select the **Page Layout** tab, then **Margins**. Choose **Custom Margins**.
3. Adjust the margins by using the **Top**, **Bottom**, **Left** and **Right** boxes. Use the **Preview** display to guide your choices. Click OK.
4. Save your changes and keep your MyLetter document open.

Select paper size, source and orientation

1. In your MyLetter document, select the **Page Layout** tab and select the **Size** button. Make the appropriate choice for paper size.



2. From the **Page Layout** tab, select the **Orientation** button. Select **Portrait** from **Orientation**. This means that the height of the document is greater than the width, like a portrait painting. **Landscape** means the width of the document is greater than the height, like a landscape painting.



3. Save and close your MyLetter document.

Experiment with these options and view your document by going to **File**, then **Print** to see the results of your choices. If you are unhappy with your choice, you can undo it by using the **Undo** button.

Paragraph formatting

Most word processed documents are written in paragraphs and you need to know how to format paragraphs in accordance with your organisation's style requirements. Paragraph formatting includes indents, spacing, and line and page breaks.

Set indents and spacing

1. Open your MyLetter document.
2. Look at the paragraph formatting tools on the **Home** tab and **Page Layout** tab, including **Bullets**, **Indentation**, **Sort**, **Show/hide paragraph marks**, **Alignment**, **Line spacing**, **Shading** and **Borders**.
3. The indent of a paragraph is how far it is positioned from the margin. From the **Home** tab, use the **Increase Indent** button or **Decrease Indent button** to move the paragraph forward or backward.



4. **Alignment** controls how your paragraph text will appear. You can choose to align your text left, centred, right or justified. Select an alignment for your text.



- Spacing has options for selecting spaces before and after each paragraph and between each line. From the **Home** tab, select **Line and Paragraph Spacing** and select **Line Spacing Options** from the dropdown menu. Under **Spacing**, select a space **Before** and **After** each paragraph. The number is equivalent to the font (letter type) size. For example, 6 pt after means the space between lines is 6 points. Keep your MyLetter document open.

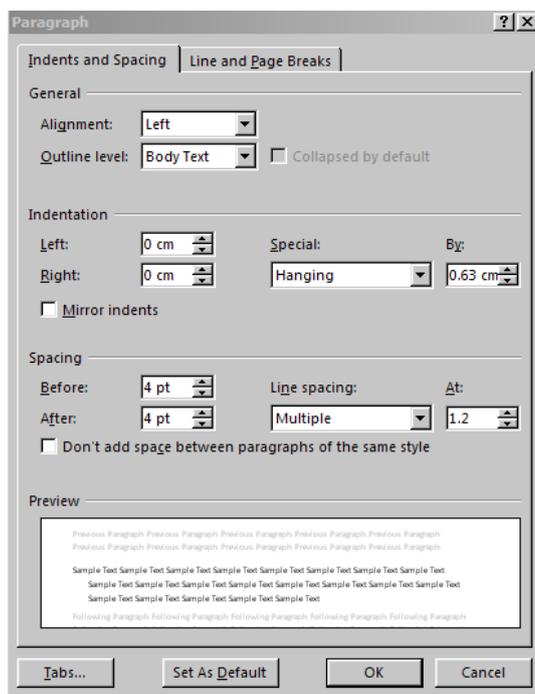


Set pagination options

Pagination relates to the division of a document into pages, as in a book.

In this exercise, you are required to select a pagination option for your MyLetter document. Select a few paragraphs in your document before beginning this exercise.

- From the **Home** tab, select **Line and Paragraph Spacing** and select **Line Spacing Options** from the dropdown menu.



- Select the **Line and Page Breaks** tab. You can control where Word positions page breaks by using the four pagination options. You need to first select the paragraphs you want the options to control.
- The **Widow/Orphan control** option is set by default and prevents the first and last lines of a paragraph from being positioned on the top or bottom of a page. Select **Keep lines together** to keep the lines in a paragraph together on a page or in a column.
- Save and close your MyLetter document.

Header and footer options

As discussed previously, headers and footers are used to add more information to a document such as the date, time and page number. A header appears at the top of a page and a footer at the bottom. The information that appears in headers and footers is repeated throughout a document, or within sections of a document. To insert a header or footer, select the **Insert** tab and choose either **Header** or **Footer**. You will notice that once you select the style of the header or footer, an additional tab – **Design** – is available for your use. The **Design** tab contains various options to create a header/footer that suits your document, such as a different header/footer on odd and even pages.

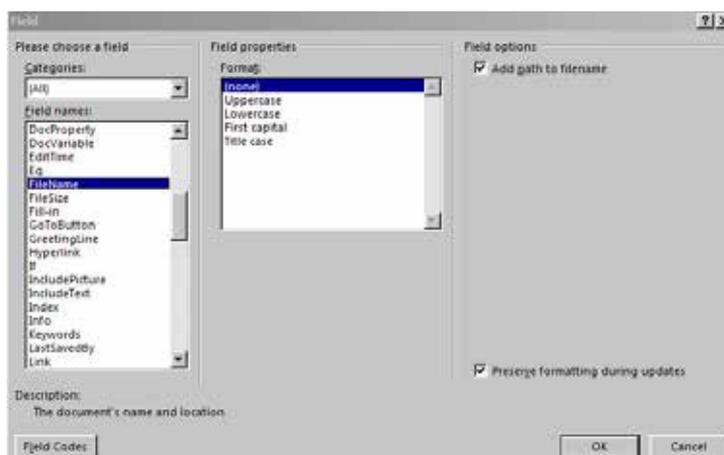
Insert a header and footer

1. Open your MyLetter document.
2. Select the **Insert** tab and select **Header**.
3. Select the **Blank** style – this will allow you to enter text to the left of the header.



Type 'AGENDA'.

4. Select the **Go to Footer** button from the **Design** tab.
5. Add the file path of the document. From the **Design** tab, select the **Quick Parts** button and select **Field**. The following dialogue box will be displayed.



6. Select **FileName**, appropriate formatting and check the **Add path to filename** option. This will insert a field that automatically provides details of the document's name and location. Click **OK**.
7. Save and close your MyLetter document.

Spelling and grammar checker

Word processing software has functions that allow you to check your spelling and grammar. Whenever you produce a word processed document, you should check the spelling and grammar before presenting the document to your audience. You can check spelling and grammar as you type or you can check the whole document once it has been written.

The word processing software can be set to a default dictionary, which is usually based on the language and country of usage; for example, English (Australia).

Check spelling and grammar as you type

In the follow exercise, you will ensure the spelling and grammar checker is turned on.

1. Open your MyLetter document.
2. From the **File** tab , select the **Options** button , and select **Proofing**.
3. Under **When correcting spelling and grammar in Word**, select **Check spelling as you type** and **Mark grammar errors as you type**. Click **OK**.
4. Enter more text into your MyLetter document. If you make a grammatical error, a blue wavy line will appear underneath the error. If you make a spelling error, a red wavy line will appear underneath the error.
5. To do a spell check, from the **Review** tab select **Spelling & Grammar** . The spelling and grammar dialogue box will appear. The spelling and grammar function will then highlight errors and suggest spelling or grammatical changes. Select the most appropriate choice and click **Change**. You can also **Add** or **Ignore** words that the spell checker does not recognise. Keep your MyLetter document open.

An electronic spelling and grammar checker will not pick up words used inappropriately, only words that are spelt incorrectly, so it is best to also proofread your document yourself.

Document protection

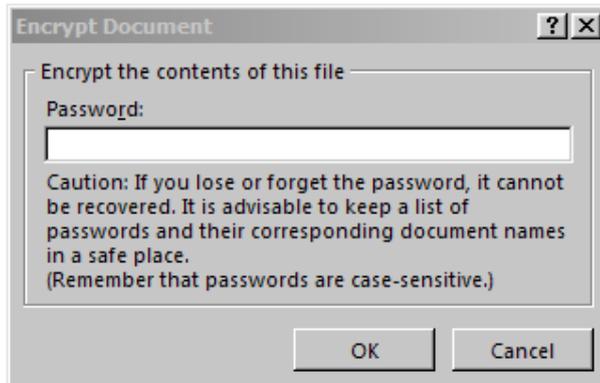
Documents you create may be confidential and thus require protection. Word processing software includes a function for creating password protection on individual documents. When you make a document password protected, make sure you write the password down in a secure place. In the following exercise, you are required to make your MyLetter document password protected.

1. In your MyLetter document, go to the **File** tab. **Info** is selected by default.
2. Click **Protect Document** and select **Encrypt with Password** from the dropdown menu.



Protect Document
Control what types of changes people can make to this document.

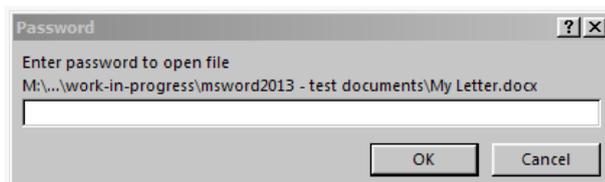
3. In the **Password** box, type a password and click **OK**.



Protect Document will now be highlighted in a yellow block.



4. In the **Confirm password**, re-enter the password and click **OK**.
5. Save and close your MyLetter document.
6. Reopen your document using your new password. Close your document.



Columns

Creating columns for some documents can be useful for presentation. Columns are commonly used for newsletters, reference manuals and other documents where you want to alter the way the information is presented. Using columns allows you to flow the information on a page into a series of columns, similar to that of a newspaper.

Corporate letterhead/logo

For many documents, such as outgoing official correspondence, it is necessary to use letterhead. Some organisations use pre-printed letterhead, and you will need to ensure that the appropriate spacing and margins are used to allow for printing on the letterhead. If letterhead is commonly used, you may also find that your office uses a set printer tray for letterhead.

Alternatively, some organisations use templates for letterhead or logo documents. These will be available to you as new documents. Select the **File** tab, choose **New**, and select either **Sample** templates or **My templates**. Most organisation templates will be available in these areas. If a common template is not listed here, speak to your supervisor or colleagues for guidance.

There may be set guidelines when using corporate logos. It may be necessary to seek approval for their use, and you may need to adhere to set procedures for the size of logos. Ask your supervisor for direction in using logos and if there are any specific procedures to be followed for your workplace. To access logos, select the **Insert** tab and select **Pictures**. In most cases, the logo will be available for use from this reference point.

Formatting a document

Most organisations have a preferred formatting style so that word processed documents have a consistent design and layout. You need to find out what your organisation's preferred formatting style is. The following information outlines common formatting options.

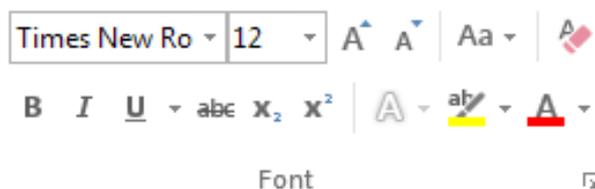
Font type, size and colour

A font is the style of type used in a document, such as Times New Roman, Arial or Book Antiqua. Fonts can have attributes such as bold, italic or underline, which can be used to add emphasis to words. Fonts can also be different sizes and colours, and you can even add special effects. Organisations use font formatting to improve the readability and presentation of documents. In the following exercises you are required to add font formatting to your MyFax document.

Usually documents have a consistent style, such as one type of font for headings and another for the main body of the text. For this exercise, you are required to experiment with a number of different types of fonts.

Format font

1. Open your MyFax document.
2. Select a few sentences of your document. From the **Home** tab, make selections from the formatting tools for **Font**, **Bold**, **Italic**, **Underline** and **Size**.



3. Select a few other sentences from your document. Change the colour using the **Colour** tool. 
4. Save your changes and close your MyFax document.

Text alignment

Aligning text and using bullets or numbers to clearly separate points can improve the presentation of text.

Text alignment refers to the way the text lines up on the page. You can access alignment options from the paragraph formatting tools in the **Home** tab.

There are four alignment options available in Word:

- Align Left
- Centre
- Align Right
- Justify

Look at the following buttons.



Bullets and numbering

Bullets and numbering can be used to create lists in a document. You can access bulleting and numbering options from the paragraph formatting tools in the **Home** tab.

A multilevel number list can be created using the **Multilevel Numbered** button. The paragraph level can be adjusted by clicking the **Increase Indent**  or the **Decrease Indent** button  from the formatting tools.

Below are examples of different styles of lists.

Bulleted list

Here is an example:

- A bullet, such as a thick dot or hyphen, is inserted at the start of each new paragraph.
- Each bullet is indented.

Numbered list

Here is an example:

1. A number is inserted at start of each new paragraph.
2. If you add or delete a paragraph from the list, the numbering will be automatically updated.

continued ...

... continued

Multilevel numbered list

Here is an example:

1. Multiple features can be highlighted with multilevel numbered lists.
 - 1.1. These lists are good for indexes or other complex documents.
 - 1.2. Each list level has a different indent.
2. Numbers or letters are automatically inserted.
 - 2.1. Explore the options in the drop-down list.

Borders and shading

You can use borders and shading to organise or emphasise parts of a document. In Word, you can add lines, boxes and shading to paragraphs, selected text and tables. A border can also be used to frame an entire page. You can access borders and shading options from the paragraph formatting tools in the **Home tab**.  

Add borders and shading

In the following exercise, you will add borders and shading.

1. Open the MyFax document.
2. Select some text in the document. Select the **Borders** tool. 
3. From the **Borders** arrow, select a line type for your border (for example, **All borders**).
4. Using the same selected text, select the **Shading** tool. 
5. From the **Shading** arrow, choose a **Theme Colour**.
6. Save and close your MyFax document.

Page numbering

Page numbering is commonly used in longer documents, such as reports. It may also be used in outgoing correspondence, such as letters. Page numbers are placed in the margin of the document by using the **Page Number** button via the **Insert** tab.



There are a number of options for where the page number can be positioned, such as left aligned or right aligned. It is possible to manually manipulate it further via the header and footer; for example, to add the word 'Page' before the number.

Tabs

Tabs are commonly used to position text horizontally on a page. Using the tab stop on the keyboard allows you to tab the text approximately 1.25 cm at each stop – this is the default option. Alternatively, it is possible to use the ruler to place the tab stop at the required position. Tabs can be aligned right, left, centred or at the decimal.

In the following exercise, you will practise using tab stops.

1. In your MyFax document, if you do not have the ruler in view, select the **View** tab and check the **Ruler**. Ruler
2. Click in a paragraph in your document.
3. Select the alignment of the tab stop using the type of tab stop on the left of the ruler . Each time you click a different alignment option is selected.
4. If there are no tab stops, click into the ruler where you want the tab stop to be positioned.
5. To remove a tab stop, simply drag it off the ruler.
6. To modify a tab stop, such as to add a leader (a dotted or dashed line), simply double-click on the tab stop on the ruler. Make alterations using the following dialogue box.



Click **OK**, then save and close your document.

Practice task 4

1. Word process this text. Format the document using different fonts for headings and the main body text. Use borders and shading to emphasise text and insert a page number, right aligned in the footer. Save your document and name it MyActivities.

Activities for fitness

Get more play into your day. There are loads of ways to get active and have fun too. Go skateboarding, fly a kite, throw a frisbee or kick a ball around. Walk the dog, shoot some hoops or play footy with friends.

Get organised. Play football, basketball, netball, tennis, hockey, soccer or another sport. You could also enrol in dancing, go rollerblading, go bowling or join a swim team.

Get back to basics. Develop and practise basic skills like throwing, catching, hopping, skipping and jumping.

Warm up first. Start your fitness program slowly every time and gradually pick up the pace. Do some stretches before a run or strenuous activity.

Cool down last. As you complete your activity session, cool down your muscles by slowing the pace of your activity before stopping.

Prevent injuries. Make sure you always wear the right protective gear for the activities you choose, such as helmets, knee-pads and mouth-guards.

Work out a plan. Figure out the best time for your chosen activities, either before or after school, or work. Don't waste your weekends or holidays sitting in front of the TV.

Miss the bus. Walk to school, ride a bike to work, rollerblade or jog to the shops. Or get off the train or bus a few stops early and walk the rest of the way.

Cut down screen time. Count how many hours you spend in front of the TV or computer and try to cut down. Surfing the net and sending emails can be absorbing, but try to limit the time you spend staring at the screen.

Get some coaching. If you show promise in a particular sport or you want to improve your skills, think about getting a coach, trainer or mentor. Don't be shy; ask your PE teacher or local community centre.

Drink plenty of water. Drink water before, during and after each activity.

2. Can you have a different header and footer on odd and even pages?

3. Which buttons can you click to have different headers and footers within the same document?

continued ...

... continued

4. Which of the following is not an option on the **Header and Footer Design** toolbar?

- Insert Date
- Insert Number of Pages
- Insert Picture
- Page Setup

5. How does Word indicate a spelling error?

6. How does Word indicate a grammatical error?

7. Describe how you can access the spelling and grammar options.

8. As well as using a spelling and grammar checking function, what else should you do to prevent errors in documents?

2B

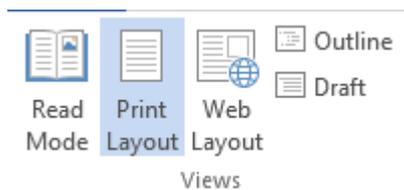
Identify and manipulate screen display options and controls

Screen display options allow you to manipulate and control the document while it is on-screen. You are able to alter the way you view the information to make it easier to read on-screen and enable you to visualise the document before you print it. Screen display options can also be used for working on a number of documents or programs at one time.

View options

View options provide different ways of looking at your document. Each view gives you an alternative way to review your document. In many cases it is personal preference as to which view is best; however, the most common view used is Print Layout.

To alter your on-screen view, from the **View** tab, select the appropriate button.



Use the view control at the bottom right of the screen to quickly adjust the view of the document – simply click on the appropriate option to change the on-screen view.



The differences in the views are as follows.

Print Layout

Allows you to view the document as it will appear when it is printed. Page margins and headers/footers are all in view. The break to a new page is obvious in this view.

Read Mode

Hides the writing tools and menus and leaves more room for the pages themselves. Read Mode automatically fits the page layout to your device using columns and larger font sizes, both of which you can adjust.

Web Layout

Enables you to view the document as you would view a web page. Page breaks, page margins and headers and footers are not displayed. Some people have a personal preference for working in this view as it has a focus on the document content.

Outline

Allows you to view the document in outline form. This is useful for longer documents or reports where styles are used much the same as chapter headings. The Outline view allows you to manipulate blocks of text. In this view, you are automatically prompted to use a new set of tools under the **Outlining** tab.

Draft

Enables you to work within the document to make necessary adjustments to text and content. Page margins and headers and footers are not visible.

Zoom options

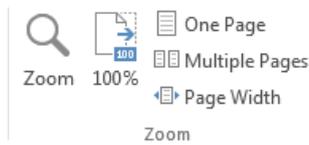
To make documents easier to read on-screen as well as to check the overall layout, there are various zoom options available for use. You might want to zoom in and increase the size of the document to see text and objects more clearly. You might want to zoom out and decrease the size of the document in view to analyse the text layout and overall document presentation.

The zoom control at the bottom right of the screen can be used to quickly adjust the zoom view of a page. Simply move the control up or down to change the zoom size of the document.

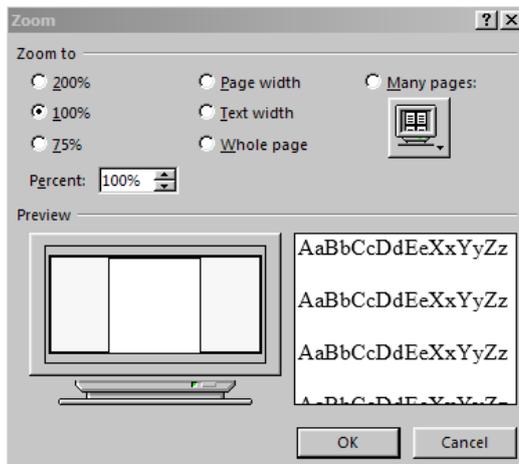


Access zoom options

To access zoom options, from the View tab, select a Zoom tool button as follows:

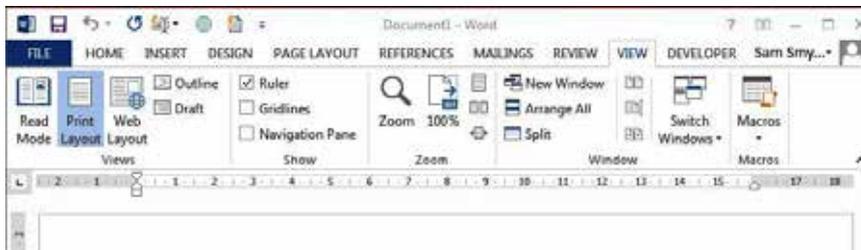


- **Zoom:** opens the Zoom dialogue box to enable you to specify the zoom level of the on-screen display. You can choose to check the predefined zoom sizes, or you can manipulate it by typing in a percentage or by selecting how many pages you want to view.



- **100%:** zooms the document to 100 per cent – normal size.
- **One Page:** zooms the document so an entire page fits in the on-screen view.
- **Multiple Pages:** zooms the document so multiple pages fit in the on-screen view.
- **Page Width:** zooms the on-screen view so the width of the lines of text matches that of the window.

The ruler



The ruler is used to judge where the margins, tab stops and indents are aligned on the page. The ruler enables you to see and alter their position. The ruler is also useful if you are working with tables or columns. When the ruler is turned on, both a vertical and a horizontal ruler are displayed.

To turn the ruler on, from the **View** tab, check **Ruler** Ruler. To turn it off, uncheck it.

Ribbons – tool buttons



In Microsoft Word 2013, toolbars have changed significantly. The program now operates by using a number of ‘ribbons’ that provide access to commonly used tools. You need to familiarise yourself with the various tools that are available in Word 2013.

Ribbons are categorised under various heading tabs such as **Home** and **Insert**. Each category has a tab so you can easily switch to the different tool buttons that you might need to use.



There are also additional tabs that may appear with groups of tool buttons that are relevant to an action that you are performing; for example, when you choose the Outline view, a new set of tools appears under an **Outlining** tab.

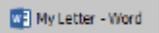
For each tab, there are groups of tools available. For instance, under the **Home** tab the available tool groups relate to:

- clipboard
- font
- paragraph
- styles
- editing.

Maximise and minimise – the document window

Maximise and minimise options are regularly used when working in any of the Microsoft programs.

You can use minimise to ‘hide’ the document you are working with from view. You are not closing or saving the document, you are just putting it away from view for the moment. You may want to do this to view another document or program. To minimise the document, use the minimise button in the top right of the title bar . Alternatively, you can click on the document name in list of documents that are open at the bottom of your screen .

To maximise a document you are working with, simply click the document name in the list of documents that are open at the bottom of your screen . This will put the document into view, and it becomes the active document that you are working with.

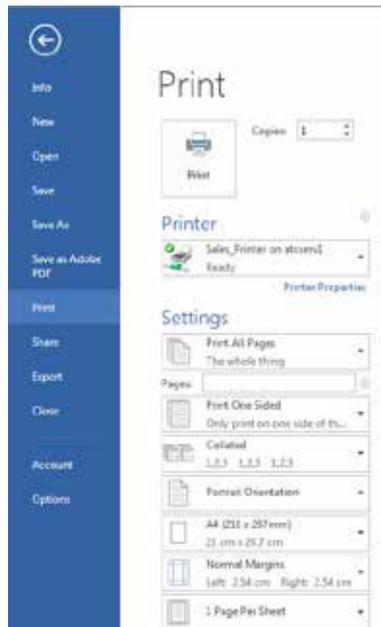
If the document window is in restore mode, it only takes up part of your screen. To maximise the document, use the maximise button in the top right of the title bar .

Print preview

Print preview is useful to check the layout and presentation of a document before you print it. It is a useful proofing tool and a good habit to get into to save time and paper. Before choosing to print a document, first preview the document and check you are happy with the way it appears on-screen.

To access print preview, from the **File** tab, select **Print**.

The document will appear in a preview window to the right of the screen.



Practice task 5

Complete the following tasks.

1. Open the MyActivities document that you saved in the previous practice task.
2. Change the view option to Draft.
3. Check the layout and presentation of the document by using the zoom tool to view one page at a time.
4. If the ruler is not on, turn it on so it is in view. For one paragraph of text, place a tab stop at 4 cm on the ruler. Go to the start of the line and press the tab key once. The text should now be positioned 4 cm from the page margin.
5. Using the **Home** tab, format the text in one paragraph – bold, font type, size.
6. Using the **Insert** tab, insert a header into the document – this should include your name and the date.
7. Using the **Page Layout** tab, check the orientation of the document is portrait.
8. Minimise the document window so that it is not in view.
9. Maximise the document window and print preview the document. Make any alterations as appropriate and send the document to print.
10. Save and close the document.

If this task was difficult, revisit the sections on manipulating screen display options or seek advice.

2C

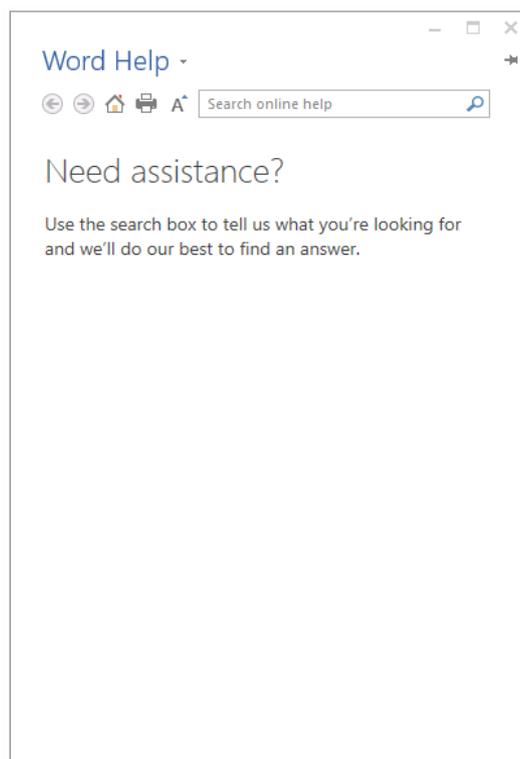
Overcome problems with document presentation and production

You may need to access help when producing word processed documents. You may not understand how a word processing software function works, or you may need help operating a printer. Whatever the problem is, you need to have a plan in place for dealing with the unexpected. Organisations usually have a number of ways of dealing with software or hardware problems. They may have manuals or training booklets for you to look at, or they may have set up a help desk.

Using Word Help

If you are working in Word, you can use the Word Help facility . Full access to the help facility requires that you be connected to the internet. It is possible, however, to access standard help facilities offline. To use this facility, simply click on it and either use the chapter index or type in a keyword for the help you need in the Search bar.

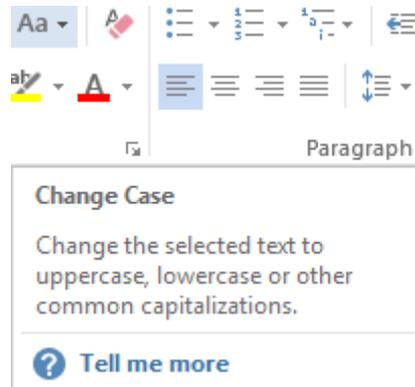
You can also use F1 to access the Word Help facility.



You can find out more about specific formatting of an on-screen document by using Shift F1 on the keyboard. This will display character and paragraph formatting.

Using tool buttons

Each time you move the pointer over a tool button, it will display a help bubble that tells you what the button is used for. For instance, from the **Home** tab, move the pointer over the font tools, and you will notice the help bubble for the **Change Case** tool button as follows:



Using manuals

Word processing software comes with user manuals that describe the software's features and provide step-by-step instructions for carrying out different functions. You can find manuals in paper-based and online formats. Look for paper-based manuals in your organisation or in your local library.

There are many websites where you can find information about Microsoft Office applications. The websites contain frequently asked questions and solutions to common problems. You can also download updates, tools and any fixes Microsoft has developed for software problems. You may find the following sites useful.

<http://support.microsoft.com>

This is Microsoft's main site for finding help to solve problems for all Microsoft products. You can ask questions online and download files, including service packs, drivers and patches. This site also gives you access to the Microsoft Knowledge Base, which offers help with word processing problems.

<http://office.microsoft.com>

This site provides resources for all Office applications. It has news and announcements and useful files that you can download. If you are connected to the internet, you can open this site by choosing Help in all Office applications. You may need to click on the bottom right of the window to allow access to Office.com.

Using training materials

There are many ways to learn about computer functions and software packages. You may have been to a training course to learn a particular computer function or a supplier may have instructed you on how to use a piece of equipment. You may have received training when you started a new job. Training courses usually provide a comprehensive set of instructions or notes that are worth keeping for future reference.

Practice task 6

Read the case study, then complete the questions that follow.

Case study

Mohana works as a personal assistant to a manager in a large organisation. One of her roles is to word process a variety of documents. While producing documents, Mohana often needs to use the Word Help facility to answer questions about use of the software. If she is unaware of what a screen icon's function is, she points to the icon and reads the help bubble displayed.

Sometimes Mohana uses Microsoft's support website to find solutions to software problems that cannot be solved using Word Help. There are manuals available in Mohana's workplace and she has photocopied the pages she needs most frequently. She keeps them in a help folder on her desk.

1. If Mohana experiences software problems, where does she go for help?

2. If Mohana is unaware of a screen icon's function, what does she do?

3. Describe how Mohana uses paper-based manuals.

4. If you experienced a software problem when producing a document, describe the steps you would take to solve the problem.

Summary

1. The use of software functions and formatting options ensures the document has a consistent design and layout.
2. You need to check, amend and proofread documents in accordance with organisational and task requirements.
3. Developing your skills in proofing and editing will help in the production of error-free documents.
4. Screen options and controls provide ways for you to check and proofread the document on-screen before you print it.
5. Before printing, print preview the document to ensure it suits organisational and task requirements.
6. Using help facilities, reference manuals and training booklets can assist in solving problems that occur when producing documents.

Learning checkpoint 2 Produce documents

This learning checkpoint allows you to review your skills and knowledge in producing documents.

Part A

Imagine your workplace or school is about to have an afternoon of activities to help people learn to deal with disagreements. You have been asked to word process a flyer that will be distributed to advertise the event. You can use the topics below for the activities or make up your own topics. Make sure you add the date of the event and where it is to be held. When word processing your document:

- use word processing formatting options to communicate your message as clearly as possible
- as required, use screen display options and controls to assist in working with and viewing the document
- use help facilities if needed
- proofread your document to check for errors
- preview your document before printing it
- save your document as `ManagingDisagreementsFlyer` and store it safely.

Topics (optional)

- Managing disagreements
- Handling arguments with friends
- How to break down the wall of silence
- Uncovering the true source of your arguments
- Methods for discussing your differences
- Ways to achieve meaningful discussions

Part B

In this activity you are required to use your `ManagingDisagreementsFlyer` to word process a report. Write one paragraph for each topic you have advertised on your flyer. Use any online or paper-based help resources available to you to complete the task.

Look at the following example of a paragraph written about one topic in the flyer.

Handling arguments with friends

Best friends will still have disagreements just as all people do. It is how the disagreement is handled and how it strengthens the friendship that makes this friend your best friend. Friends accept each other for who they are, not what they have or who they know. Friends don't try to change each other. Friends support each other through thick and thin. Disagreements happen, but they don't last long. If you have a disagreement with a friend, try to keep the channels of communication open and don't start to ignore or avoid them.

When producing your report, make sure you:

- use paragraph formatting; for example indents, spacing and margins
- format text using font size, type, colour, borders and shading
- add lists if they are appropriate
- proofread your report to make sure it has a consistent style and that there are no spelling or grammatical errors
- as required, use screen display options and controls for working with and viewing the document
- use help facilities to assist you if needed
- preview your document before printing it
- name your document `ManagingDisagreementsReport` and save it in a safe place.

Part C

Word process the information below. Make sure it delivers the intended message and that you do the following:

- Use formatting options to improve readability.
- Use screen display options and controls as required for working with and viewing the document.
- Use help facilities to assist you if needed.
- Proofread and edit your document for spelling and grammatical errors and consistent style.
- Print out your document and save it as `OfficeTips`.

Tips for working in an office

Tip: Six Traits of Leaders

Studies have indicated six traits that are consistently associated with leadership:

Ambition & energy

Desire to lead

Honesty and integrity

Self-confidence

Intelligence

Job-relevant knowledge

Tip: Dealing With Change

Change can be difficult for many of us. For example, if you've been transferred to a new department or given a new supervisor, you will need to make some adjustments. Try to understand the change and how it is making you feel. Look for coping mechanisms that address your feelings. For example if you feel you might be lonely in a new department, try to find ways to help others and make some new friends.

Tip/Help Others Fit In

How can new workers be made to feel welcome on the job? It takes more than a tour of the office and an employee orientation. Find ways to include and value new team members. Invite them to sit in on planning and staff meetings, look for their input on new projects, ask them to serve on committees. Valuing employees helps strengthen their commitment to the team

Tip: Blame vs. Solutions

When things go wrong on the job, resist the urge to start placing blame, and pointing fingers. Management is usually more interested in damage control. So, add to your personal value and professional image by presenting viable solutions rather than spending a lot of time dwelling on the cause. Caution Don't, ignore the cause completely, as the solution may lie in understanding why the problem occurred to begin with

Tip Take Days Off

Be sure you are familiar with your employers' vacation and time off policy. You'll want to understand how time off accrues or when you are eligible for time off, so that you won't plan a holiday and then find out you are not eligible

Tip. Be Selfish at Work

Unselfish co-workers contribute to effectiveness and productivity in the workplace. By putting team goals and objectives before personal interests, team players decrease their value to the team and at the same time boost their own self-esteem and confidence;

Part D

Word process your answers to the questions below. Ensure that you apply appropriate formatting to enhance the layout and presentation of the document. Use view options and controls to assist in producing the document, and where needed access help facilities that are available to you. Save the document as MyWordProcessing, and preview it before you print the document.

How would you do the following when word processing a document?

- Change the orientation of the document to landscape
- Insert a page break
- Change the margin width for the whole document
- Alter the margin width for part of the document (for example, a paragraph)
- Insert a bullet mark
- Show paragraph marks
- Indent a paragraph
- Change the alignment of a paragraph to centre
- Change the line spacing of the document to double-spaced
- Insert a header that includes a logo on the left side (use a Clipart picture if no logo is available)
- Insert the file path of a document to the footer – centre aligned
- Insert a page number to the footer – left aligned
- Spell check the document
- Protect a document from changes
- Change the layout of the document to be two columns
- Format text to alter the font type and size
- Add a border and shading to a paragraph
- Use the default tab stop
- Change the view option to Full Screen Reading
- Use Zoom to view document as one page
- Turn the Ruler on
- Find out what a tool button does
- Minimise the document window
- Maximise the document window
- Preview a document
- Access and use the online help facility

Topic 3

Finalise documents

Ensuring that you produce quality documents that adhere to organisational and task requirements is important. Thoroughly checking and proofreading a document before sending is necessary to ensure the correct message and corporate image are being delivered to the appropriate people. For example, if you have not spell checked a document and it contains errors, or if you use the wrong letterhead, it sends an invisible message to the receiver of the document. They may think that you, and your organisation, don't really care about the content of the document.

When preparing documents, it is important that you adhere to the required time lines and job instructions. If you believe there needs to be alterations to either the time line or job instructions, you will need to discuss this with your supervisor. Many businesses have strict deadlines for completing tasks – it may be that documents or reports are required for signature by the end of the week. If you fail to meet the deadline and don't send out the required documents or reports, it may affect other tasks.

In this topic you will learn how to:

- 3A Preview, check, adjust and print a final document
- 3B Prepare documents within time lines and requirements
- 3C Name and store documents, and exit the application safely

3A

Preview, check, adjust and print a final document

All word processed documents need to be checked to make sure they meet style and layout specifications. Documents also need to be checked to make sure the information is accurate. You have to check style and layout specifications as well as for spelling and grammatical errors. Word processed documents also require time to edit and proofread before they are printed, published or distributed to colleagues.



Edit and proofread

When you edit a document, you refine it to make sure you have written it in the best way possible. Editing is also used to check that documents meet organisational layout requirements and to identify and correct errors in grammar, punctuation and spelling. Proofreading means checking that the final document is the same as any draft document you were given to copy. For example, your manager may give you a handwritten letter to word process. You need to proofread your document to make sure you have copied it correctly.

Often, the words editing and proofreading are used for the same thing – checking that everything in the document is correct.

Developing a checklist may be helpful, as you can go through all the points that need to be considered before a final draft of the document can be made. Using a checklist can improve the speed and efficiency of proofreading. If your organisation does not use a checklist, maybe you could develop one for all staff to use.

Look at the following checklist for proofreading.

Spelling

Advice

Never rely entirely on the spell check function on your computer. It only identifies spelling errors, not incorrect use of words. Words may also be spelt in different ways; for example, American and Australian spellings of words such as organize/organise. Check the style manual of your organisation or ask your manager if you are unsure.

Grammar

Advice

Grammar and punctuation suggestions made by software applications are not always correct. Check them yourself before choosing the change suggested.

Style

Advice

Style should be consistent. Make sure headers and footers are correct and spacing is consistent throughout; for example, '10.30 am' is always written in the same way (not '10:30 a.m.' or '10.30am'). Check the style manual of your organisation or ask your manager if you are unsure.

Numerical data

Advice

Match your document with the original figures you were given and make sure it is accurate. It is easy to make a mistake when entering a lot of numerical data into a document.

Accuracy of information

It is important to ensure the contents of any documents you are producing are accurate. If the information contained in the document is not accurate, it can cause problems for the company you represent. For example, you might work for a builder and have been asked to send out a letter of offer with a quoted price to a customer. You accidentally mistype the quoted price as \$35,000, when it should be \$85,000. The customer would probably be more than happy with the offered price; however, the builder would not be happy about the situation.

Taking the time to check information and make sure it is correct helps to save time, improve office efficiency and increase the prospects of customer and organisational satisfaction.

As part of the proofing process, check:

- name and address details
- product information and pricing
- dates

- reference details (for example, catalogues and previous correspondence)
- spelling
- document-specific facts (for example, name of legislation and required action for the reader to take).

Consistency of layout

Following a specific format for the layout and presentation of documents helps to promote the image that a business is trying to portray. Having a consistent layout makes it easier for you because you know the predefined criteria for producing different documents. Many organisations use templates to help ensure a standard layout is followed for the production of documents. The templates may already have paragraph formatting, font formatting, headers/footers, logos and the text of the document there. It may just be a case of inputting the name and address, or altering only parts of the content.

A consistent layout for documents boosts the image and reputation of an organisation. It can influence people's perceptions of the professionalism of the correspondence, and of how serious you are about your job and the tasks you perform.

Follow content and format instructions

Guidelines or instructions should be used when word processing documents. These may relate to the content of the document, or its format and layout. For example, you may be asked to draft a letter to a supplier about upcoming orders, taking care to highlight the number of orders and dates expected for future orders and checking the product codes before printing it on corporate letterhead. These are specific instructions on how to produce the document. Not following the instructions may delay the final production of the document and reduce the effectiveness of the letter or the information's accuracy.

It is always important to clarify instructions if needed, and ask questions about what else may be needed if you are not sure. If you have your own ideas on how the content or format of a document could be improved, speak to your supervisor.



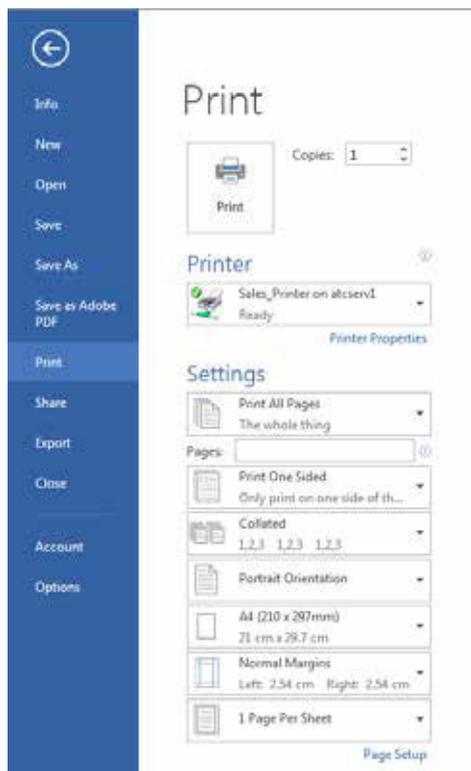
Print documents

Once a document has been checked for errors, you may have to print it. Before printing, use the preview option to see how the document will look on the printed page. To see the preview, select the **File** tab, then **Print**.

Print a document

In the following exercise, you will print a document.

1. Open your MyLetter document.
2. Select the **File** tab, then **Print**. If you are unhappy with the preview, click the back arrow  and modify your document.
3. From the **File** tab, select **Print**. You will see a Print dialog box similar to the following.
4. Under the Printer heading, select the appropriate printer.



5. Under Settings, select **Print all Pages**. By selecting this, you will print the whole document. You can also choose to print selected pages from the document by entering page numbers into **Pages**; for example, 3-9 would print pages 3 to 9.
6. From the **Copies** box, select 1. You can change this option to print multiple copies of the same document.
7. From **Print All Pages**, you can choose to print only the **odd** or **even pages**. Click **Print** to print your document.

The **Collated** option controls the order in which multiple-page documents are printed. For example, imagine you want to print two copies of a three-page document. If you choose Collated, Word will print the pages as follows: page 1, page 2, page 3 of document one, then the same for document two. If Collated is not chosen, the two documents would print page 1, page 1, page 2, page 2, page 3, page 3.

Practice task 7

1. Proofread this document. Correct spelling, punctuation and grammatical errors to make it more readable. Also check for consistency of style. Word process the entire document with your corrections. Save your document as MyProofreading.

Proof reading

Reading a document that has glaring spelling errors is very distracting. Bad punctuation, inconsistencies in text, inappropriate grammar, missing text or poorly laid out all detract from a document's readability. Therefore, all documents that are going to be read by anyone, other than the originator, must follow this golden rule - Proof It First

Make sure that your work is free from anything that could undermine the message you are trying to communicate: It is difficult to proof-read your own work as you only see what you expect to see. Ask a colleague or friend to proofread any word processed document that you have to produce.

When you are proof reading check for:

Spelling mistakes;

Incorrect: capitalisation

poor punctuation

Inconsistent use in style, headings, tenses, etc.

Misnumbered; sequences

formatting inconsistencies

Factual errors

Read the case studies, then answer the questions that follow.

Case studies

Mary is the customer service officer for a large bathroom supply company. She regularly takes calls from customers enquiring about sale items and the pricing of goods. She recently took a call from a customer – Tim Wood. Tim said that he was a regular customer and that he had seen in the local paper an antique bath on sale for \$700. Tim asked Mary to confirm the sale price and closing date of the sale in writing as he had misplaced the advert. Mary was more than happy to oblige and said she would have a letter out to him in the afternoon mail.

John works for a small charity organisation. Part of his job is to create a monthly newsletter to send out to the charity's client base. The content and format of the newsletter follow a standard outline, and John's supervisor is happy with the comments he has received from clients about how easy it is to read. John thinks the newsletter is not modern enough and has decided that he will change the font type and logo. He intends to send the newsletter out to the existing client base, as well as local businesses in the area. John believes that this will attract new supporters to the charity.

continued ...

... continued

2. What does Mary need to clarify to ensure that the information she sends in the letter is accurate?

3. What company resources could Mary have used to check details while she was speaking with the customer?

4. What instructions should John follow to produce the newsletter?

5. What are your opinions about John's ideas?

6. What should John do before he makes changes to the newsletter?

3B

Prepare documents within time lines and requirements

Whenever you are given a work task, you need to plan a time line. A time line is a plan for how long a task will take to complete. It also breaks the task into steps and details when each step needs to be completed.

Word processing a document usually involves a time line. This identifies which tasks need to be carried out before the document can be completed.



Organisational time line

You will often be required to meet specific deadlines. Your supervisor may give you a deadline for completing a set task (for example, preparing a draft of a letter by 2.00 pm), or you may have regular deadlines for common tasks (for example, on a monthly basis, sending letters to customers who are overdue in paying their accounts). It is important to the efficient running of your organisation that these sorts of time lines are adhered to. If a deadline might not be met or you have conflicting work priorities, discuss this with your supervisor as soon as possible. Your supervisor may be able to assist you by suggesting how the deadline can be met or by agreeing to adjust the deadline.

Using a diary system and a to-do list can help you prioritise tasks and stay aware of the time lines required for set tasks.

Time line agreed with internal/external client

Organisations have both internal and external clients. Internal clients are those that work at the same organisation as you and include your work colleagues, people in other departments, managers and supervisors. External clients are those that are outside the organisation, including clients and suppliers. In many cases, time lines are set and agreed with your client base – both internal and external. If you agree to a deadline for completing a task, it is important that you meet it. Your supervisor may be able to make suggestions that you have not thought of to help you meet your deadline. Discussing the issues with the client may enable you to adjust the deadline.

Meeting a deadline demonstrates your competency in undertaking tasks and also shows professionalism on the job. Make sure that when deadlines are being set, they are both achievable and realistic.

Practice task 8

Read the case studies, then answer the questions that follow.

Case studies

Thanh works as a clerical assistant and one of his roles is to produce word processed documents for his manager. Thanh is asked to produce a report for the organisation's general meeting in two weeks. Several people in different departments are required to write articles for the report. Thanh also needs to write an article about the progress of a current project and include this in the report. Thanh makes a list of everyone who has to submit work for the report. He informs each person about the work they need to submit and when it is due. Thanh then has to write his own article that will be included in the report. He plans all the tasks he still needs to carry out. He has to talk to colleagues involved in the project, draft and edit his article and collect articles from colleagues.

Mae works as a customer service representative for a large telecommunications business. She regularly deals with both internal and external clients, and is required to produce documents giving product descriptions and prices of new products. With the introduction of new technology to the business, many more new products have become available. This has increased Mae's current workload and she is finding it difficult to meet the standard time lines for sending out the required information. Mae is an efficient worker and has always been able to produce the required documents before the required time lines. Because of this, her clients expect that they will receive the information in advance of when it is needed.

1. Explain why Thanh's report needs time planning.

2. What do you think is good or bad about Thanh's planning?

3. When there are a number of people involved in the production of a document, what kinds of things can go wrong?

continued ...

... continued

4. What should Mae do? Who should she discuss this situation with?

5. Can you suggest any systems that Mae should follow to help her meet the time lines?

6. If Mae misses the time line and doesn't discuss it with anyone, what might be the reaction of the clients?

3C

Name and store documents, and exit the application safely

Information is a valuable asset in any organisation. How information is stored and the security measures used to protect it are central to an organisation's procedures.

The documents you word process might be stored on a server that allows access by multiple users. A server is a computer that delivers information and software to other computers linked by a network.

To enable staff to log on to a server, the systems administrator issues each person with a username. The user must then create a password.

Usernames and passwords give users access to the information they require to complete workplace tasks and allow the allocation of different levels of access to information.



Data security

You may find that some of the documents you word process are confidential. Ask your manager for your organisation's policies regarding confidential material.

Data needs to be safeguarded against accidental or deliberate damage. Data loss is usually caused by human error or system failure. Some organisations use a data cartridge at the end of the day to back up the information on the database. This cartridge can then be taken off-site for safety. If any damage occurs to the server or the premises, a complete backup is available.

A server holds a large number of files and folders. Organising this information helps users find what they want. If you are saving information onto a server, make sure you know where to put it. Find out what your organisation's policies are regarding the storage and security of word processed documents.

Create a document to be used by previous versions of Word

Microsoft Word 2013 has some features that are not available in previous versions. If you are creating a document that people with an older version of Word need to access, you will need to work in Compatibility Mode. Compatibility Mode turns off some of the new features, which ensures that people working in older versions (for example, 2003) will still have full editing capabilities.

To create a document in Compatibility Mode, select the **File** tab, select **Save As**, and select Word 97-2003 Document in the **Save As Type** list.

In the file name box, type a name for your document, and click **Save**. It is important that this is done when you first create the document.

Name, store and close documents

When producing word processed documents, you need to be aware of how to name them and where to store them. All organisations have policies and procedures for naming and storing documents. Ask your manager to explain your organisation's requirements. Documents can be stored in soft or hard copy. This means they can be stored electronically in a computer or in paper-based form in a filing cabinet.

Some organisations have strict naming standards that must be adhered to, such as all project files having to start with PRO. Another example is using client reference numbers rather than names. If there are many clients with the same surname, a unique reference number will avoid confusion. Find out the naming standards for folders and files in your workplace or place of study.

Digital storage

Paper documents can become damaged, yellowed and brittle. In addition, unless you are very careful about storage and use, important documents can be easily torn, misfiled or accidentally disposed of. Storing many documents can also be expensive and some organisations prefer to store information digitally. Digital storage saves on paper and space.

Another advantage of storing documents digitally is that powerful databases can be used to search stored information. Databases enable you to find specific information that would be much harder to find by searching through hard copies of documents. Databases also provide management with powerful metrics and reporting tools. For example, statistical information can be gathered from a database, and detailed reports can be produced.

In many organisations, folders and files are stored on servers. Deleting old electronic files and folders needs to be done regularly to ensure an efficient use of server space. Always ask for authorisation before making any deletions.



Folder structure and naming standards

Folder structure and naming standards are needed to allow staff to set up folders quickly and easily. Shared directories are folders on a network that a group of people have access to.

If you use shared directories, you need to assess whether a file should be placed in the shared directory or whether it should stay on your computer's hard drive. Decide which documents are for your use and which need to be shared.

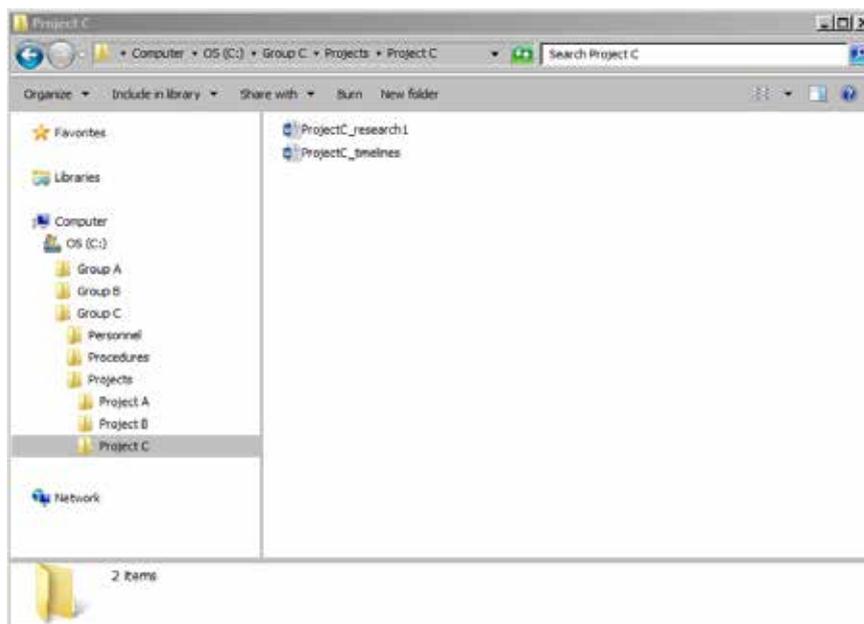
Advantages of using shared directories and naming standards

- It can prevent losing or misfiling electronic documents.
- Work is less likely to be duplicated.
- It makes it easier to share information between colleagues.
- Documents on the same or related subjects are located together, which helps people find and retrieve documents.

Shared directories

To set up a shared directory, you must first allocate a shared network drive. Your IT coordinator can help with this. The first place to organise a directory is at the folder level. Folders have a treelike structure that branches from a parent directory to sub-folders in a hierarchical structure.

Look at the following example.



In this structure, the server has three folders for three separate work groups: Group A, Group B and Group C. Group C has three major folders: Procedures, Personnel and Projects. The Projects folder includes Project A, Project B and Project C. Project C has two documents: ProjectC_timelines.doc and ProjectC_research1.doc. The file path for retrieving a document starts at the server and ends when the correct document is located. For example, to reach ProjectC_timelines.doc, the file path to follow is:
C:\GroupC\Projects\ProjectC\ProjectC_timelines.doc.

Document properties

As well as using user-friendly naming and saving conventions and adhering to organisational requirements, it can be helpful to use document properties to record common information about a document. Document properties help describe or identify a document, and include details such as title, author name, subject and keywords that state the document's topic or content. The information contained in document properties can also be used when conducting a search for files on your computer.

To access properties, select the **File** tab. **Info** opens by default. Hover your pointer over the property you want to update and enter the information. The dialogue box below will be displayed to allow you to enter the required details.



Back up files

Many organisations have set procedures for backing up files. In many large organisations, this is administered through the IT department and is an automatic process. In this case, the only thing you need to do is ensure you save your files to the appropriate network drive and folders.

In smaller organisations, it may be necessary for you to back up files; this may be done on a daily or weekly basis. If this is the case, check with your supervisor about back up procedures.

Backing up files is an important procedure because it helps prevent the loss of documents and information, and is extremely useful in case something happens to the network or computer system and you still want to retrieve previous documents.

Hard-copy storage

Many documents stored digitally are also stored in hard copy. This safeguards against a computer system failure. Hard-copy storage requires space and the establishment of a filing system that uses consistent, simple and meaningful names similar to those used in digital storage.

Hard-copy documents need to be kept up to date. Managing hard-copy documents is necessary as storage space in organisations is often scarce and valuable. Old or superseded documents should be destroyed on a regular basis according to organisational policy. Retention schedules list the timeframe that documents need to be kept before they can be destroyed. Documents without permanent value may be scheduled for eventual destruction. Find out what kind of hard-copy filing system is used at your workplace or place of study.



Close applications

After creating or modifying an electronic document, you need to exit the software application without causing damage or loss to data. Data loss can occur when a computer program stops performing its expected function. Often the program, or even the whole computer, may appear to freeze. All computer users will experience data loss at some time and will be unable to access data. Data may have been accidentally erased or corrupted and made inaccessible. Below are a number of precautions you can use to prevent data loss, but keep in mind the main cause of data loss is human error.

Work on one document at a time

Try to work on only one document at a time. If you need to work with multiple applications open, you should close applications when they are no longer needed. This will help your computer work more quickly and will prevent data loss in the event of computer failure.

Lock unattended workstation

Data loss can occur if someone else tampers with your work. If you are working on a document at your workstation, you need to lock your computer or exit the application before leaving your workstation unattended.

continued ...

... continued

Use virus protection

Other causes of data loss include virus damage, operating system or application software bugs and failed upgrades. Using virus protection programs and frequently updating software can help prevent data loss.

Prevent computer malfunction

If your computer starts to make unusual noises or display warning messages, shut it down immediately and do not turn it back on until you have received advice from an IT coordinator.

Use the correct application exit procedure

To exit the program, select the exit button, which is located in the top right corner of the window. If you have recently made changes to your document, you will be prompted to save changes.

Practice task 9

Read the case studies, then answer the questions that follow.

Case studies

Matthew works as an office administrator in a large organisation. His duties include formatting reports and saving them on the server. He is also responsible for backing up the server at the end of each day. At the end of a busy day, Matthew had completed several reports for different departments within the organisation. He had to save each of them in a different location, and it took him a while to work out where they all belonged. He wasn't sure if he had saved them all in the correct place. After this, he was running late and decided not to back up the server. The next morning, the reports that Matthew had saved were needed for an important board meeting. However, during the night a virus had infected the server, destroying all the information from the previous day.

Fred has retired from an organisation after working as an administrative assistant for 10 years. The areas Fred was responsible for were accounts and projects. The day after he retired, someone needed a file that Fred had created and stored. The file contained vital accounting information. It was discovered that Fred had saved more than 500 files in a variety of folders and the file could not be located. The folders had ambiguous names such as Folder1 and Folder2 and the files had names such as august1.doc and march2.doc.

continued ...

... continued

1. What would be the consequences if Matthew did not save some of the reports in the correct place?

2. Can you think of any consequences of not backing up data on the server?

3. Describe why Fred's folder and file naming system failed.

4. Fred was responsible for two areas. What could he have done to make sure files could be easily located?

5. Explain why folder and file names should be consistent, simple and meaningful.

Summary

1. To ensure the production of quality products, it is important to thoroughly check and proofread the final document.
2. Documents produced need to adhere to organisational and task requirements.
3. It is necessary to follow agreed time lines and instructions.
4. Not meeting time lines or following instructions can have a negative impact on the organisation.
5. Following appropriate file referencing and saving options makes it easier to locate documents.
6. Many organisations follow strict conventions for the storage and saving of documents.
7. Following organisational backup procedures reduces the chances of document loss.

Learning checkpoint 3 Produce documents

This learning checkpoint allows you to review your skills and knowledge in producing documents.

Part A

Produce a word processed document for a workplace. It can be your own workplace, or one you are familiar with. The document can be any type of document outlined in Topic 1. When producing your document, make sure you:

- use the organisation's style and layout specifications for the type of document you are producing – use word processing functions and formatting options to achieve the required result
- check the document for spelling and grammatical errors
- work within a time line set by your manager
- preview and check the document
- make any necessary adjustments before printing it
- save the document in the correct folder
- exit the program.

Part B

Word process the following text. Make three drafts of the text using different formatting styles and layouts. Each document should have its own consistent style, but the documents should be very different from each other. Be as creative as you can with your formatting styles and layout. Remember that the main aim of formatting is to make the document easy to read.

- Check the documents for spelling and grammatical errors.
- Preview and check the documents.
- Make any adjustments before printing them.
- Save the documents to an appropriate file path and name your documents CallCentre1, CallCentre2, CallCentre3.
- Exit the program.

Types of call centres

The way a call centre is organised differs from one call centre to another. Some call centres divide their services very clearly into sales and customer service, with an operator dealing exclusively with either sales or service support. Some large centres have created different sections to deal with different aspects of a product, so when a customer calls, the call is sent directly to the specialist.

Inbound calls

Some call centres – known as inbound call centres – handle only incoming calls and specialise in providing information or service to customers. Customer service calls may involve customers calling to ask a question, requesting help with a problem, complaining about a product or service, or asking for technical assistance. The kind of call depends on the purpose of the call centre.

Outbound calls

Some call centres handle only outgoing calls. These types of calls involve activities such as market research, selling, surveying customer satisfaction levels or soliciting for donations. Just as with incoming calls, the types of calls depend on the purpose of the call centre.

Part C

Read the case study, then answer the questions that follow.

Case study

Lauren has recently commenced work as a receptionist for a small hotel. Her duties include word processing tasks, such as formulating letters and short reports. Lauren has been asked to prepare the minutes of the managers' meeting. Actions that each manager has agreed to and due dates for their completion need to be highlighted, as well as summarised as a type of check-sheet. Lauren has been asked to complete the final document by the end of the day and distribute it to the managers. There is a shared network system that all managers and Lauren have access to.

8. What type of layout should Lauren use to prepare the minutes? What can she do to ensure that it is consistent with the layout of previous minutes?

9. What should Lauren do to proofread and check the final document?

10. What is Lauren's deadline for completing the task? Are there any additional instructions for Lauren to follow before she can say she has finished the task?

11. Where should Lauren save the document? What should she name it so it is easily accessible?

Part D

Word process your answers to the following questions. Preview, check and adjust the document before printing. Allow yourself one hour to complete this task and ensure you have recorded your name and date in the header. Before exiting the program, file the document appropriately and name it MyAnswersTopic3.

1. What does editing a document mean?
2. What does proofreading a document mean?
3. When checking for accuracy, what are three details you might need to check?

4. What is the importance of a consistent layout?
5. In a workplace, why is it necessary to follow instructions and time lines?
6. If you needed to print only page 2 of a four-page document, how would you do this?
7. If you needed to print multiple copies of a document, how would you do this?
8. Why do you need to follow organisational requirements when saving and naming files?
9. If you sent a sales letter to Ms Ha Nguyen (customer no. 33487), what would be an appropriate file name?
10. How do you exit Word?